

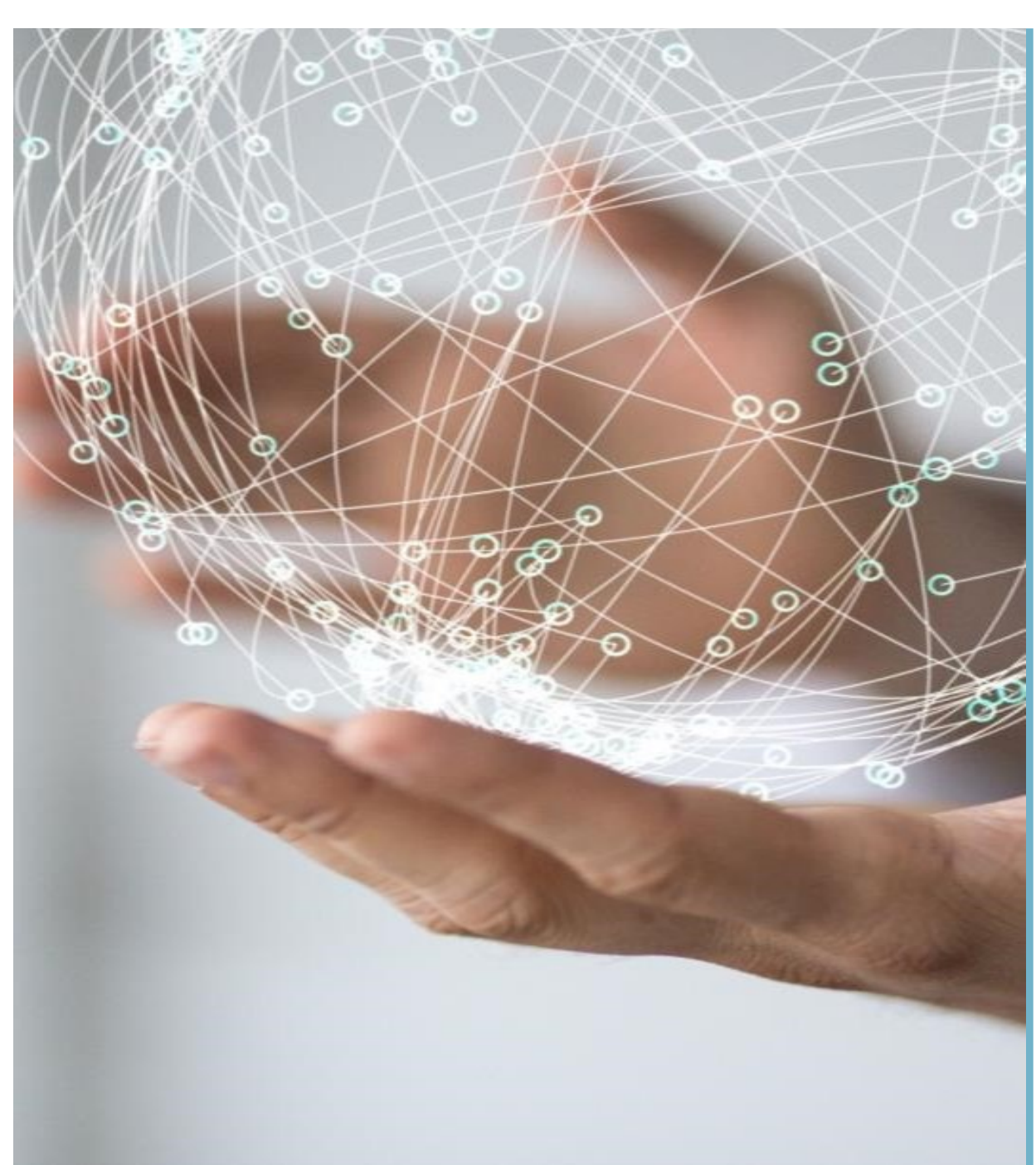
Australia's infrastructure

Public satisfaction and priorities

October 2017

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Methodology



Methodology

- These are the findings of the first Ipsos Infrastructure Index conducted via Global @dvisor.
- In total 21,043 interviews were conducted between 25 August and 8 September 2017 among adults aged 18-64 in the US and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 28 countries around the world via the Ipsos Online Panel system:

Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, New Zealand, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Serbia, Spain, Sweden, Turkey and the United States of America (N.B. some questions were not fielded in China, and New Zealand)

- The 2016 survey used the same methodology but was conducted in 26 countries between 26 August and 9 September 2016 (New Zealand and Serbia were added in in 2017). This means that the global trend does not involve a like-for-like comparison.
- A selection of trends are included. Further information is available from dan.evans@ipsos.com

National

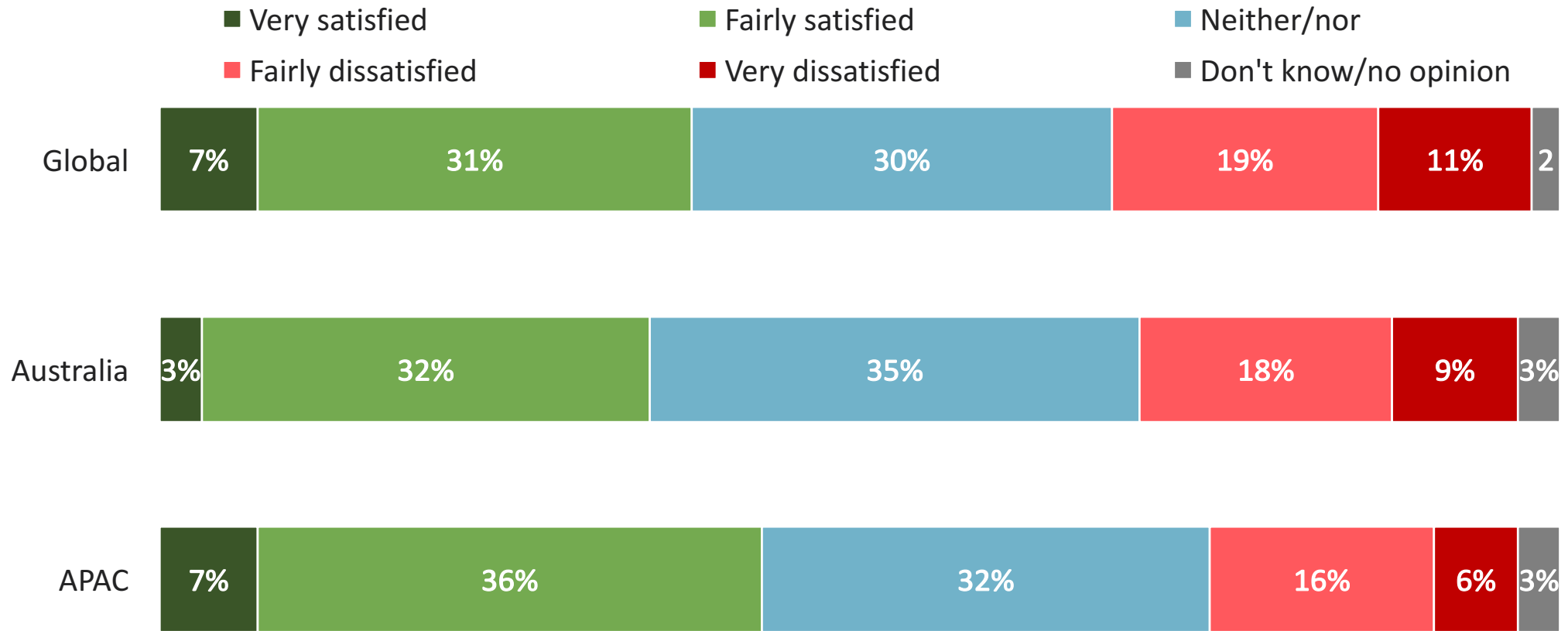
infrastructure



National infrastructure

Q. I now want you to think about Australia's infrastructure. By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

Overall, how satisfied or dissatisfied are you with Australia's national infrastructure?



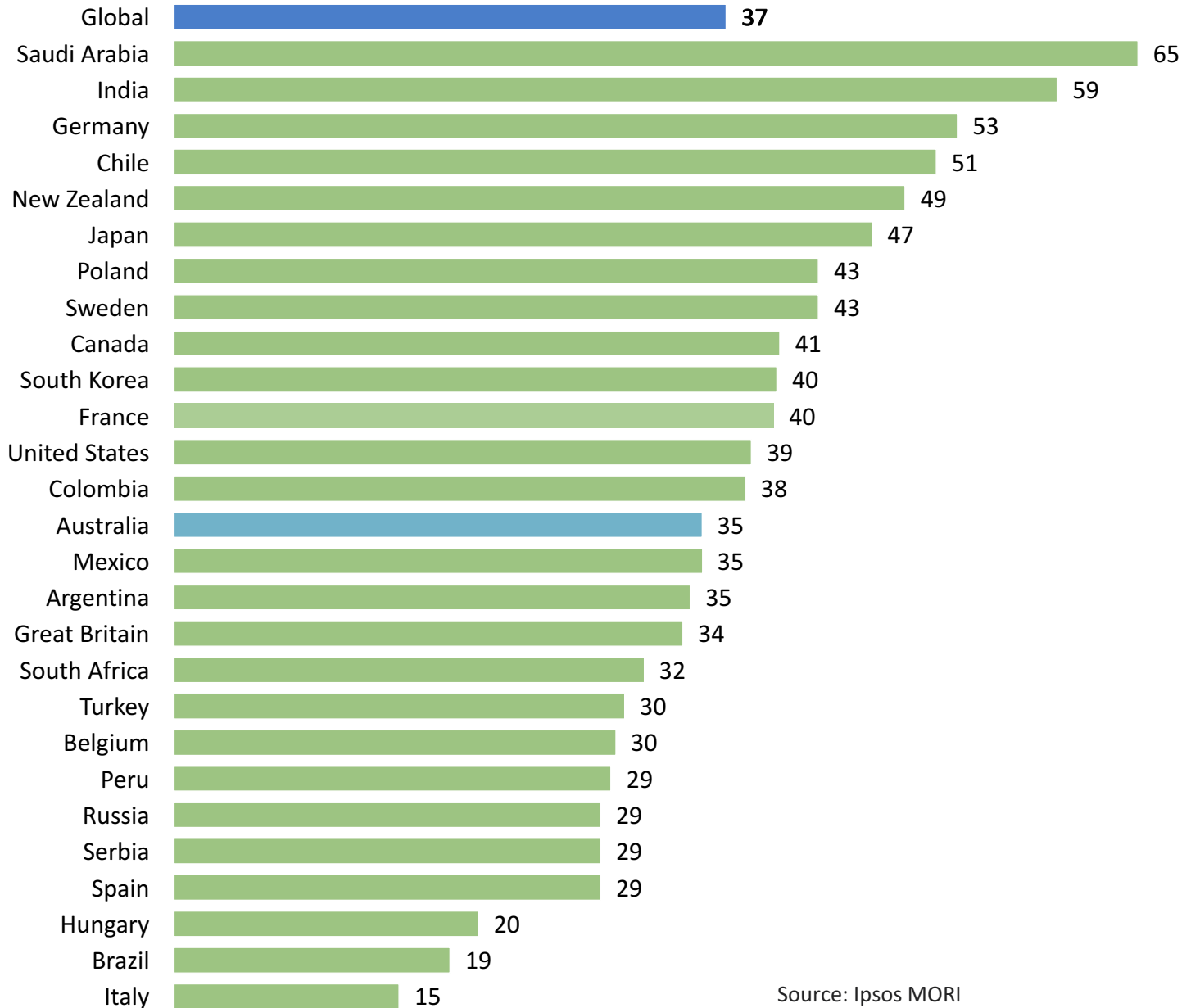
Satisfaction

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

% very/fairly satisfied



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

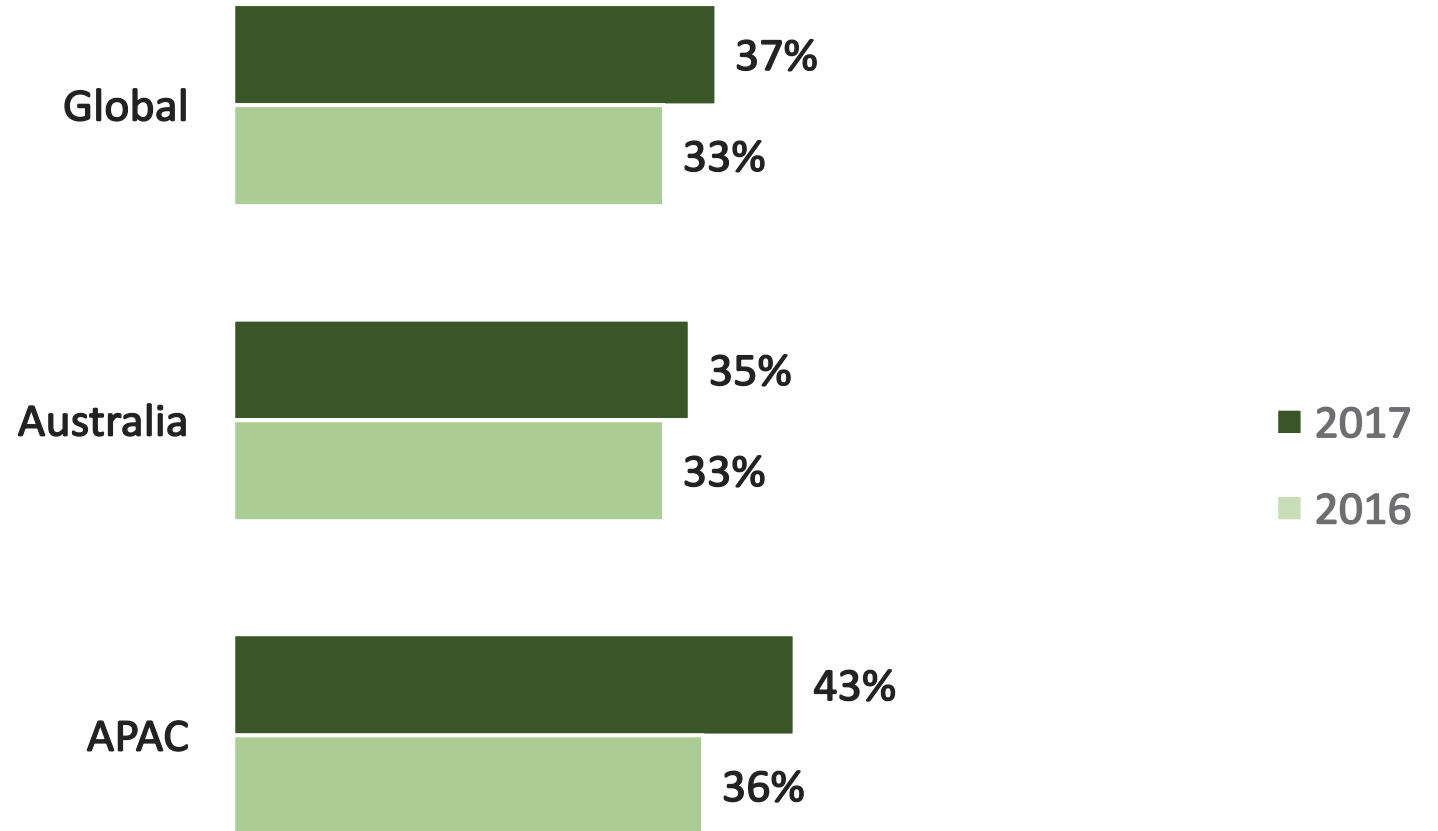
Change vs 2016

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

% very/fairly satisfied



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

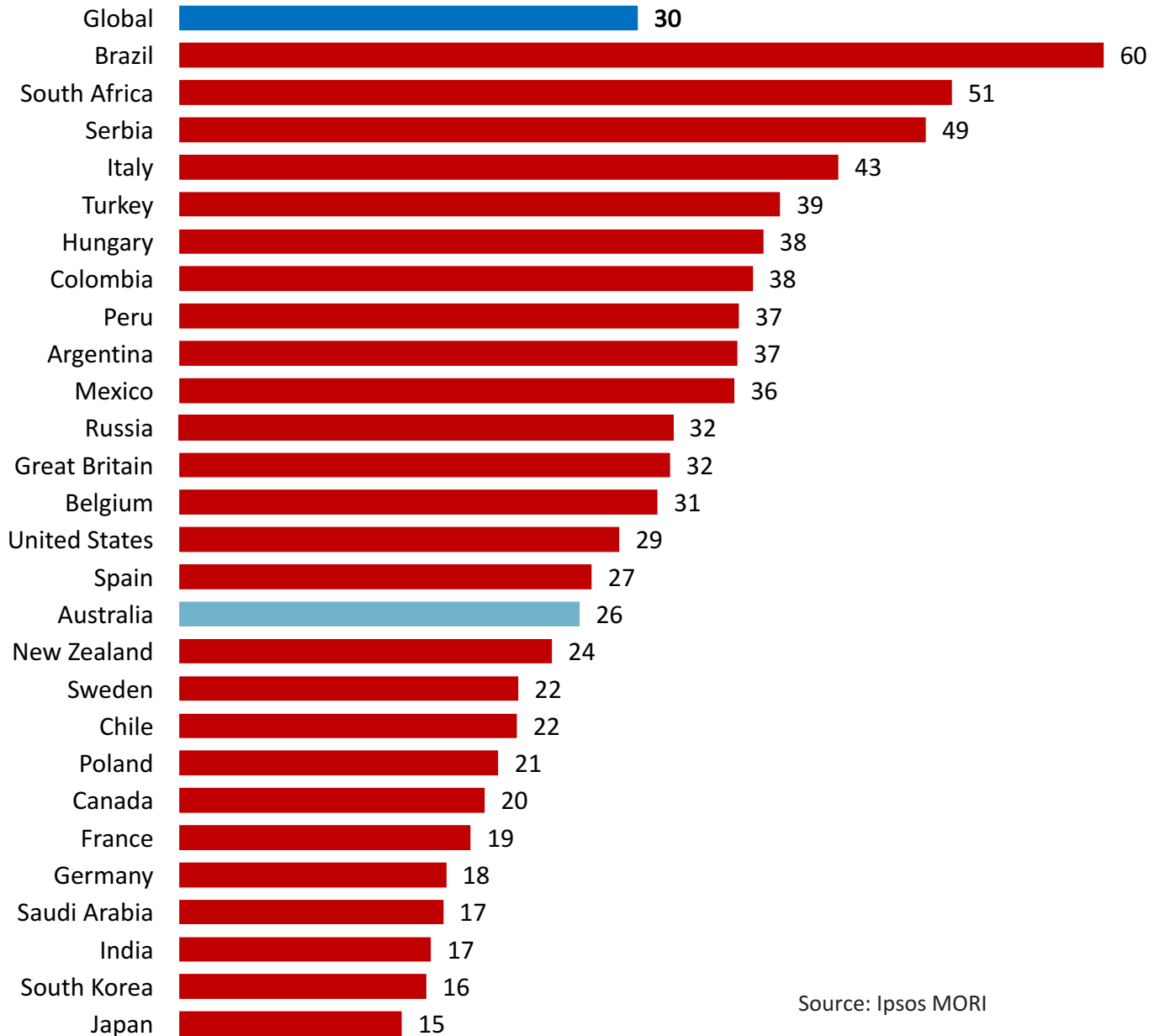
Dissatisfaction

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

% very/fairly dissatisfied



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

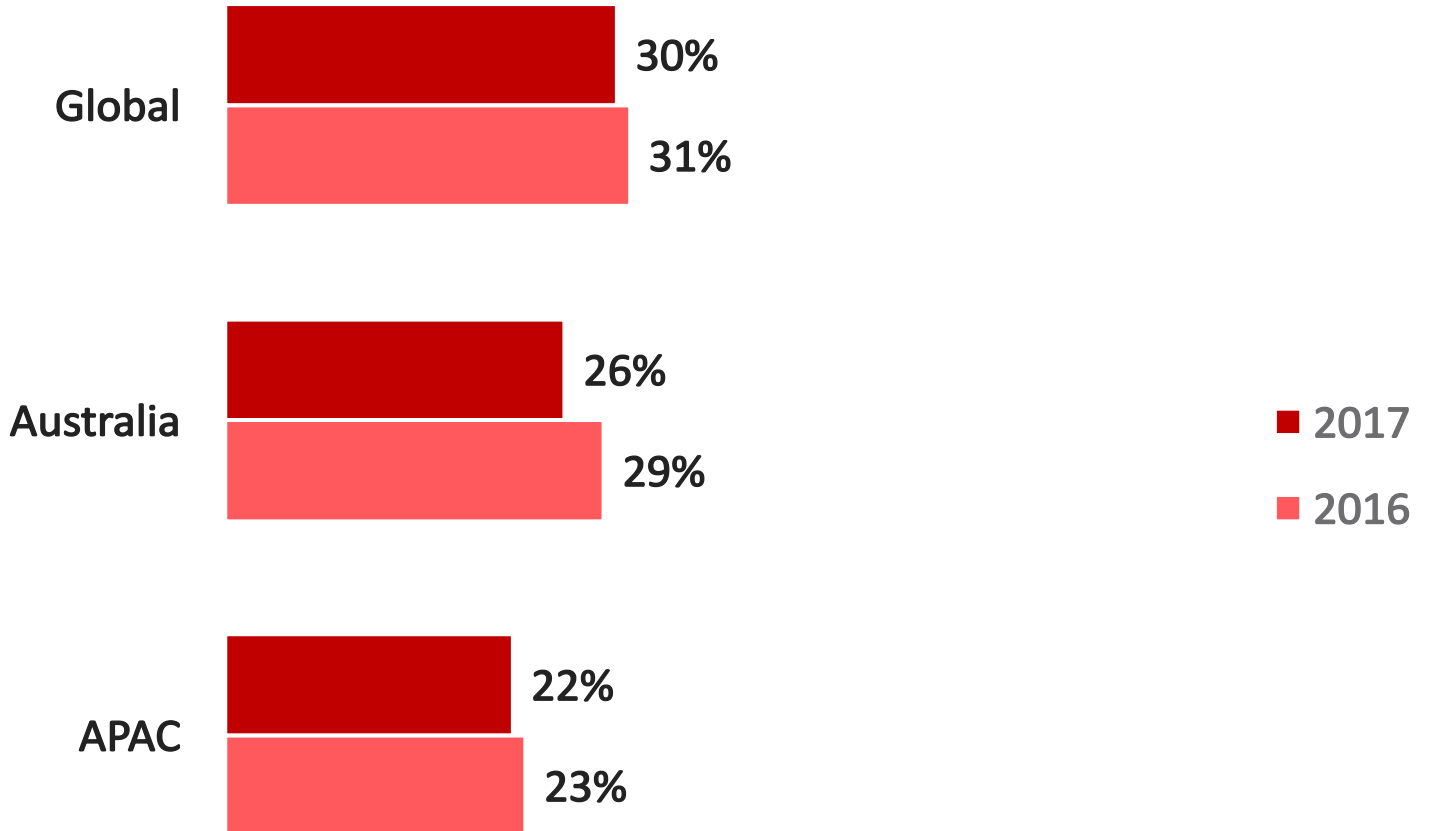
Change vs 2016

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

% very/fairly dissatisfied



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

Ratings of types of infrastructure

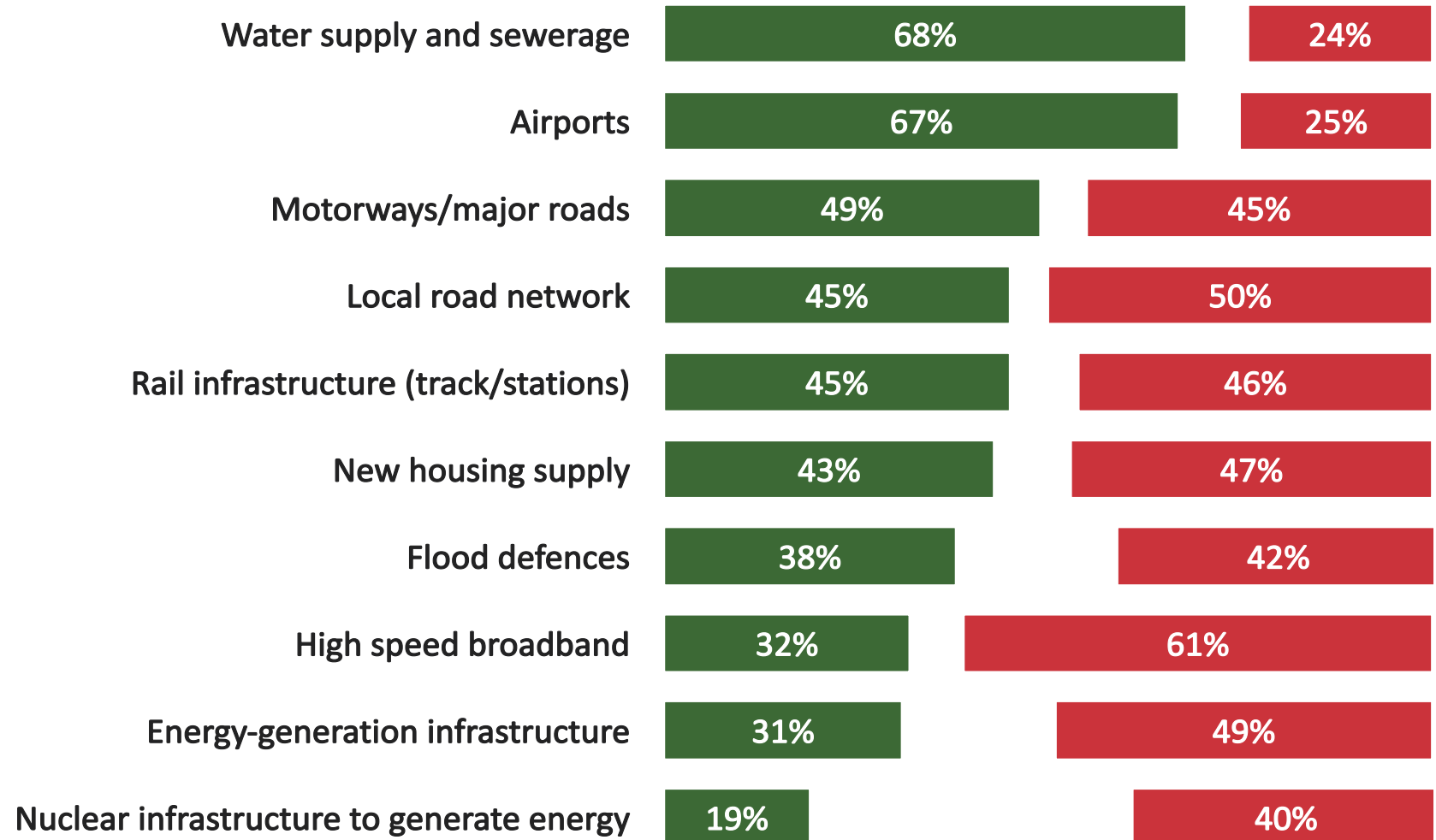


Australia: types of infrastructure

■ % Very/fairly good ■ % Fairly/very poor

Q. These next questions are about different types of infrastructure.

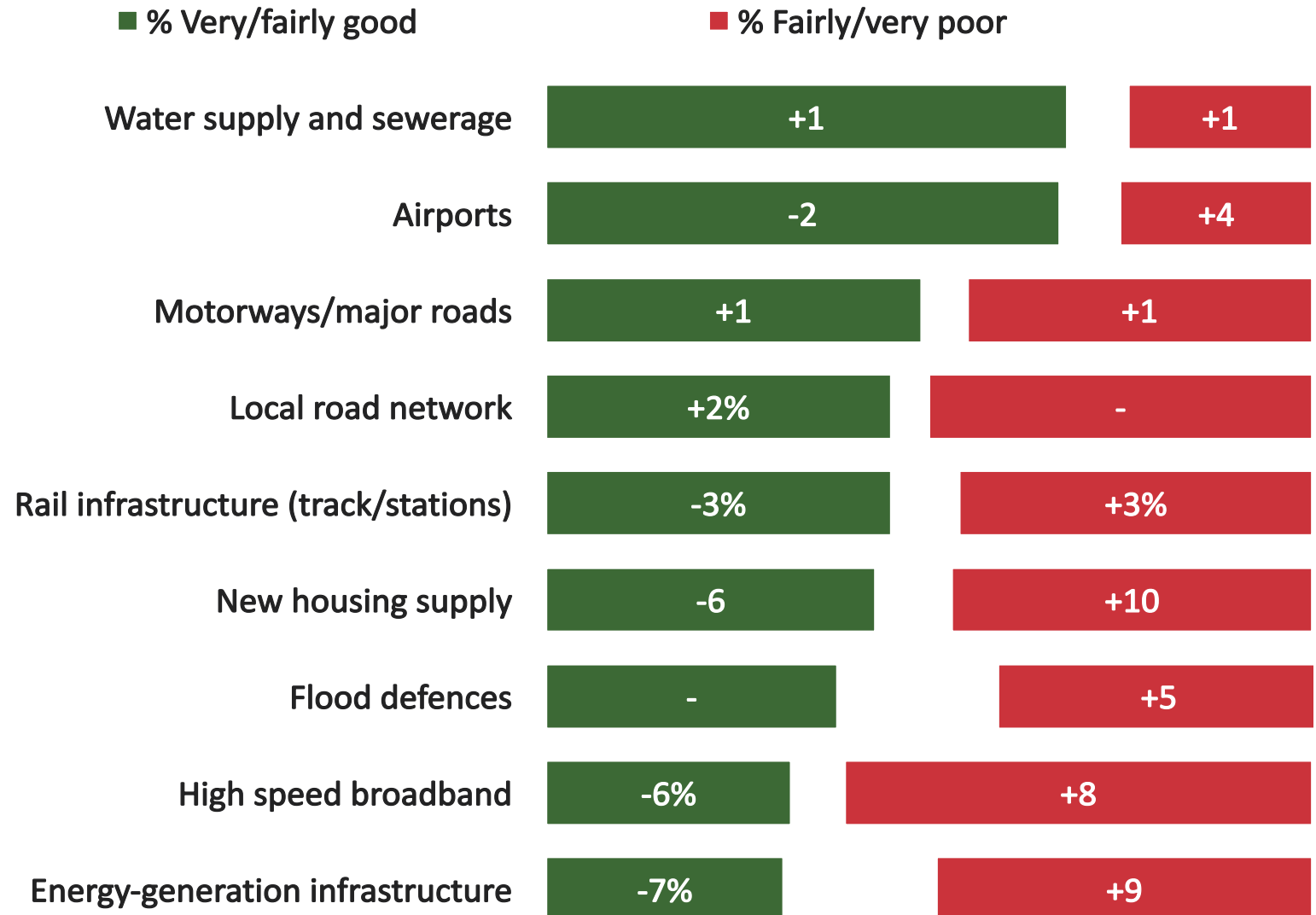
Please indicate how good or poor you rate the current quality of each one in Australia...



Australia: change since 2016

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in Australia...



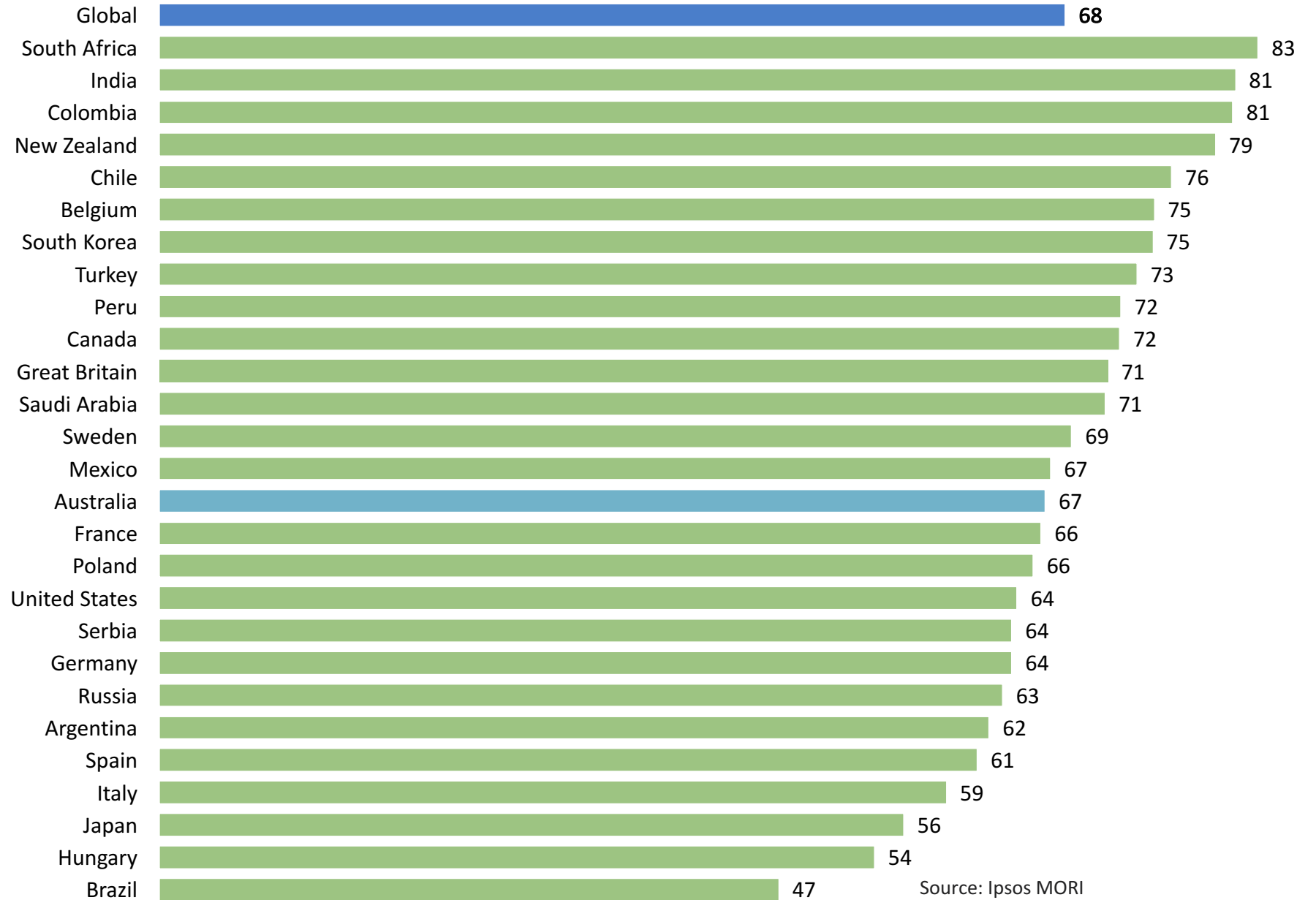
Airports

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Airports

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

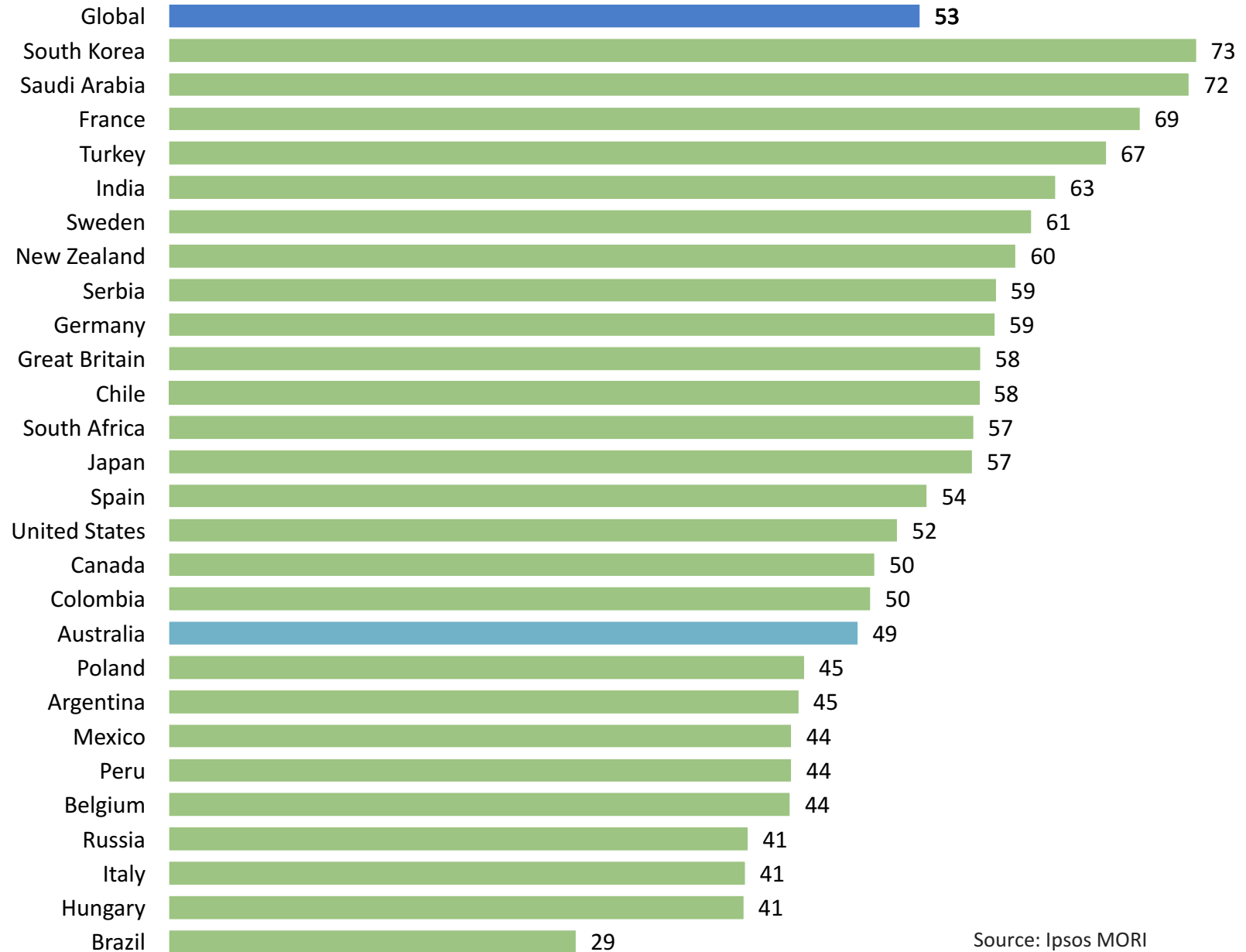
Motorways

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Motorways/
major roads

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

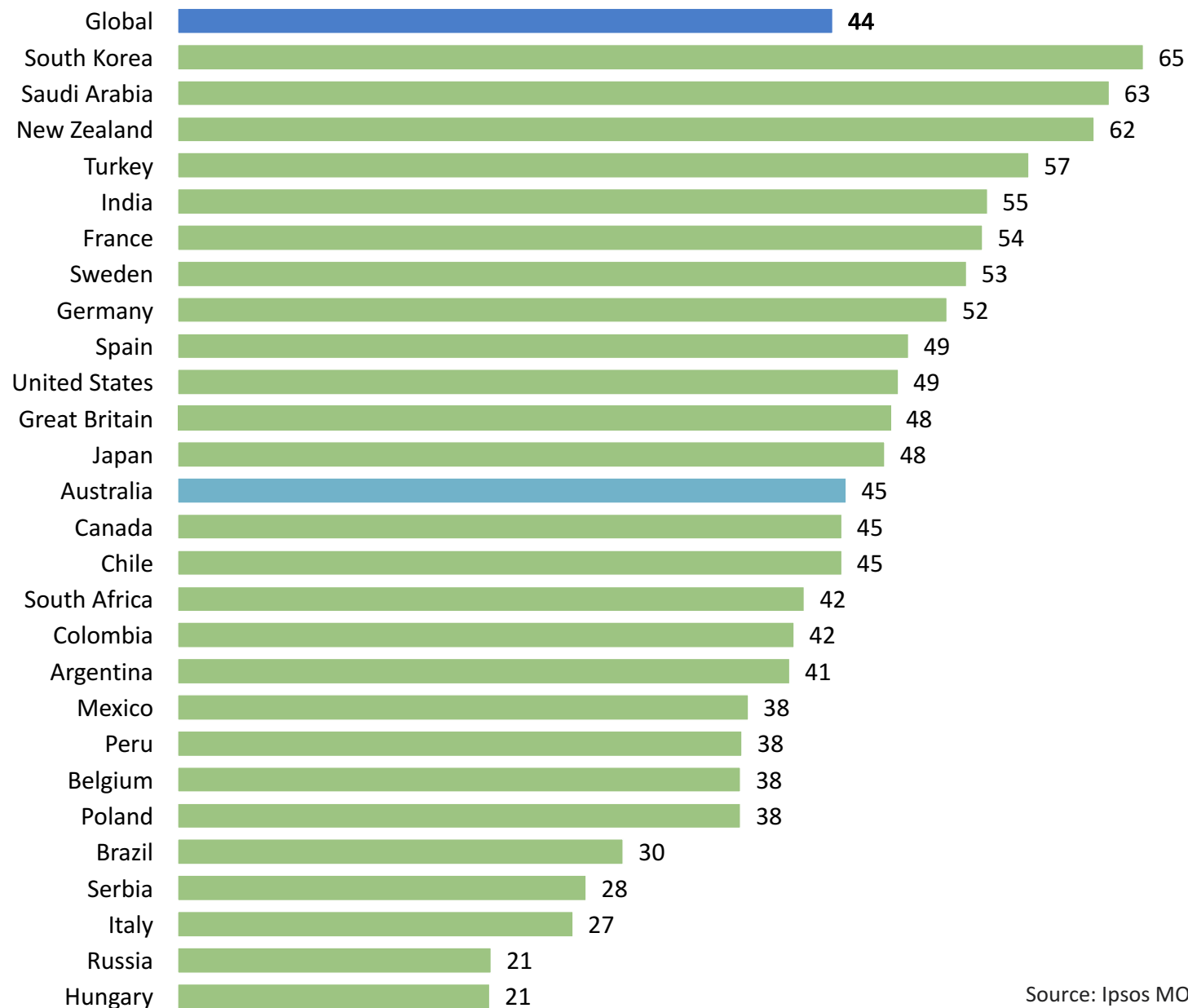
Local roads

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Local road network

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

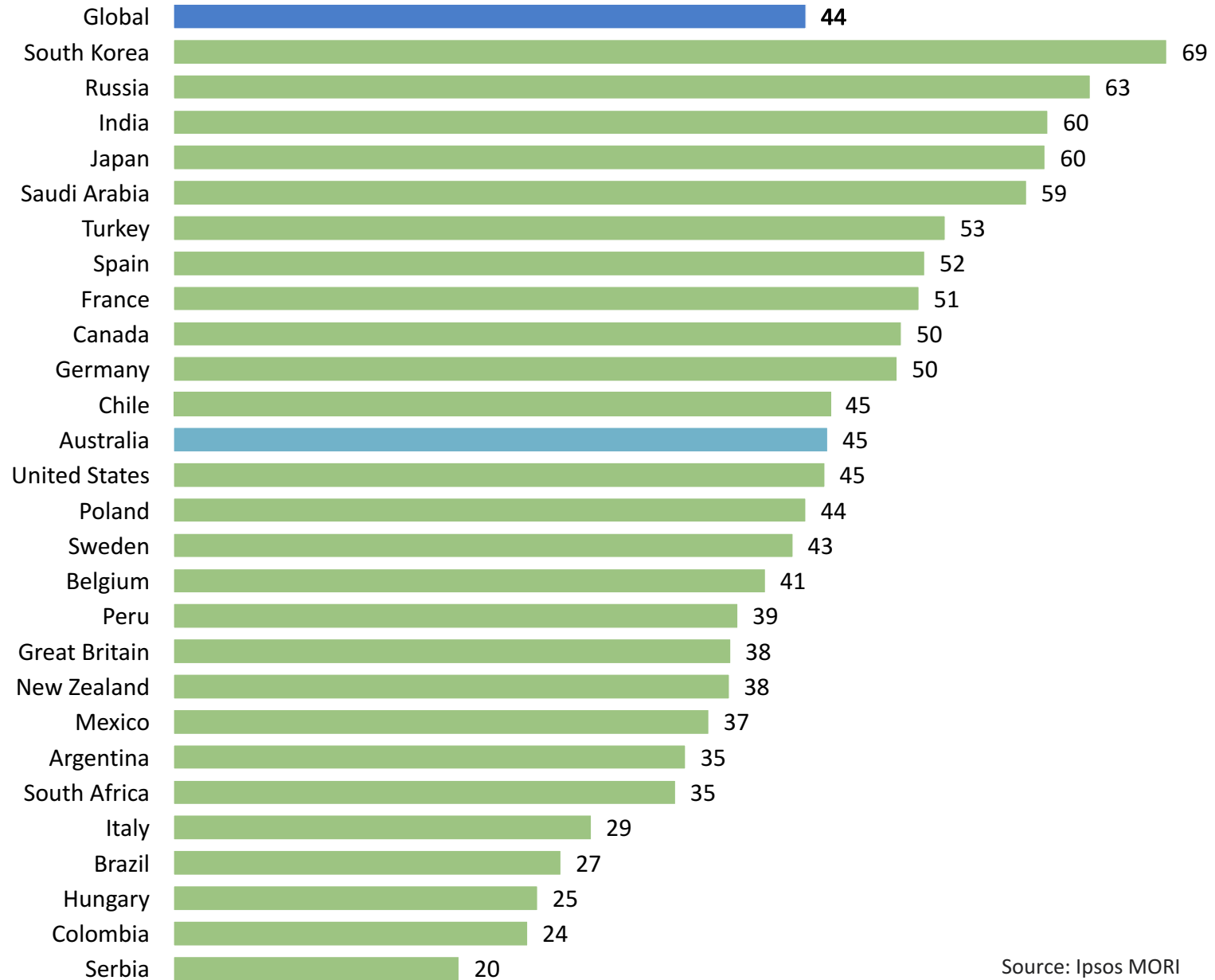
Rail

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Rail infrastructure
(track/stations)

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

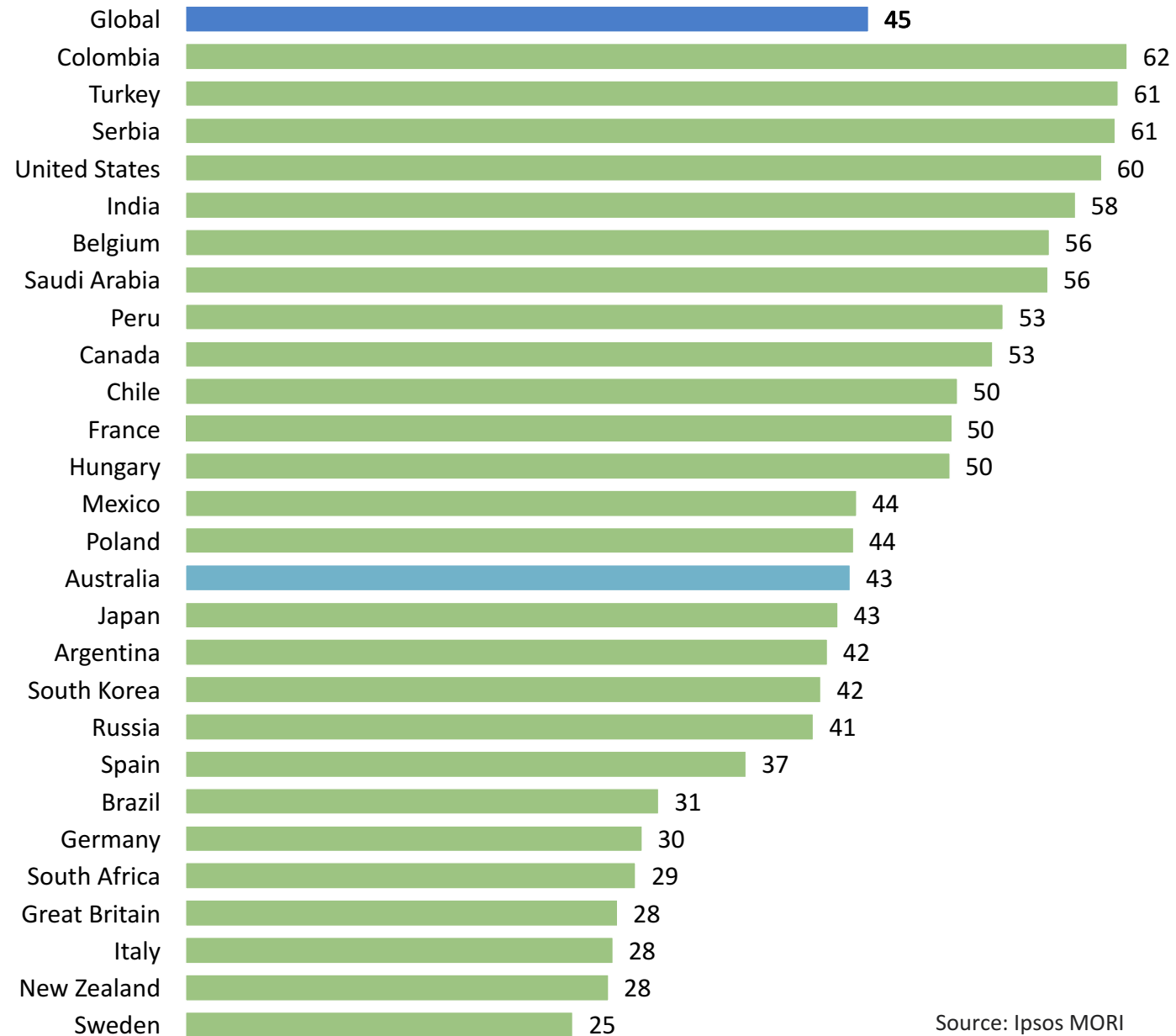
Housing supply

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Housing supply

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

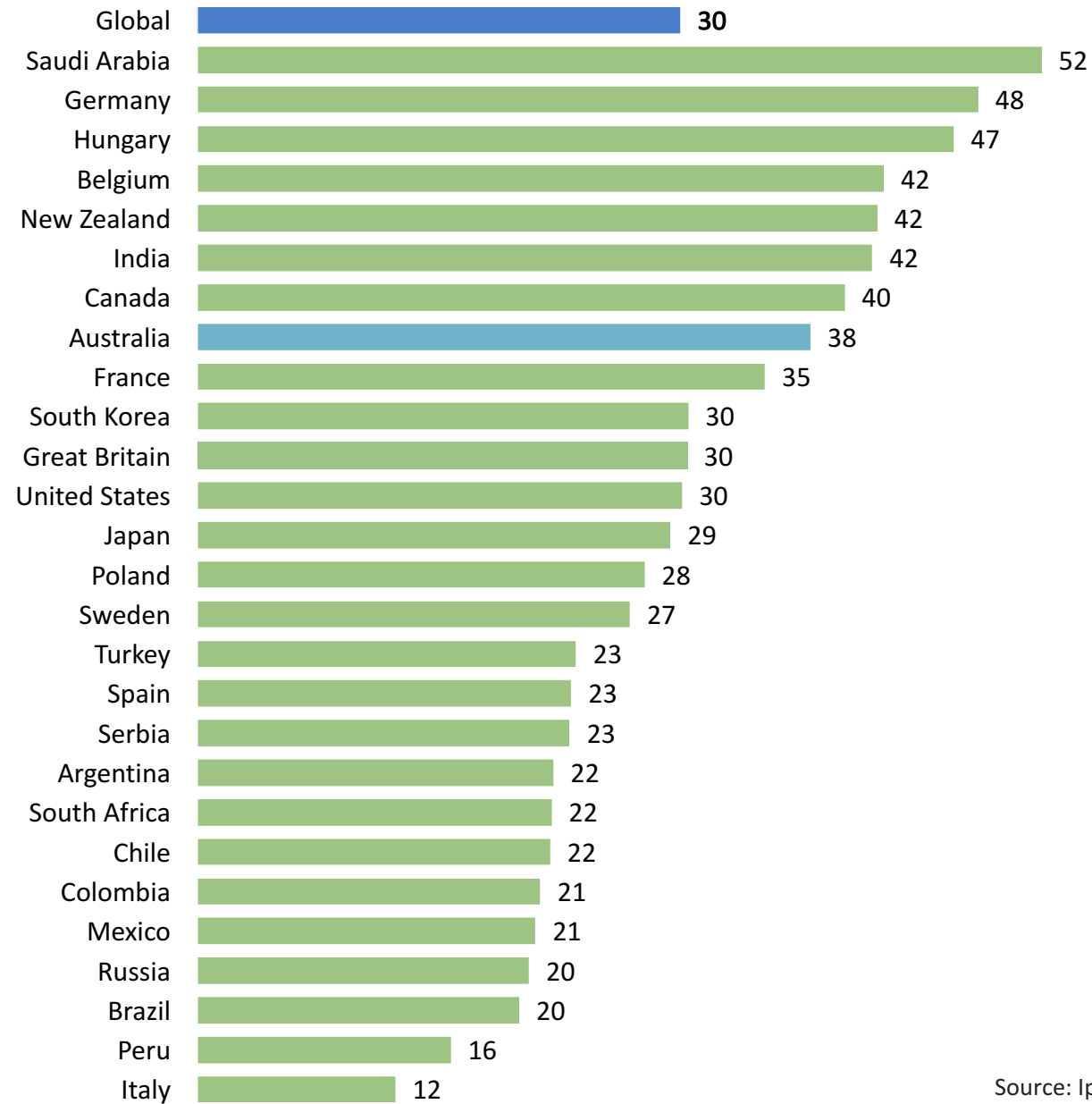
Flood defences

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Flood defences

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

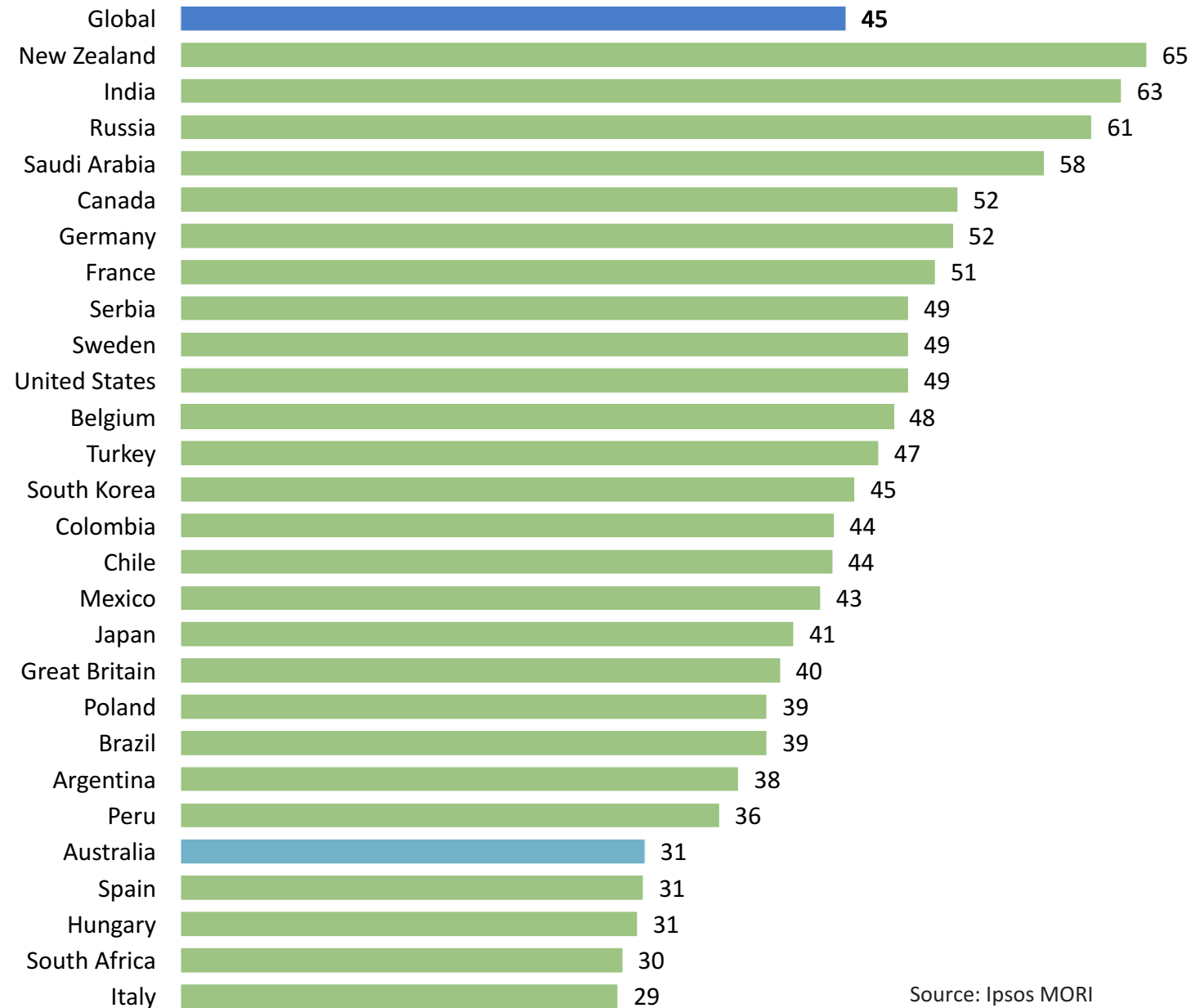
Energy

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Energy-generation infrastructure

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

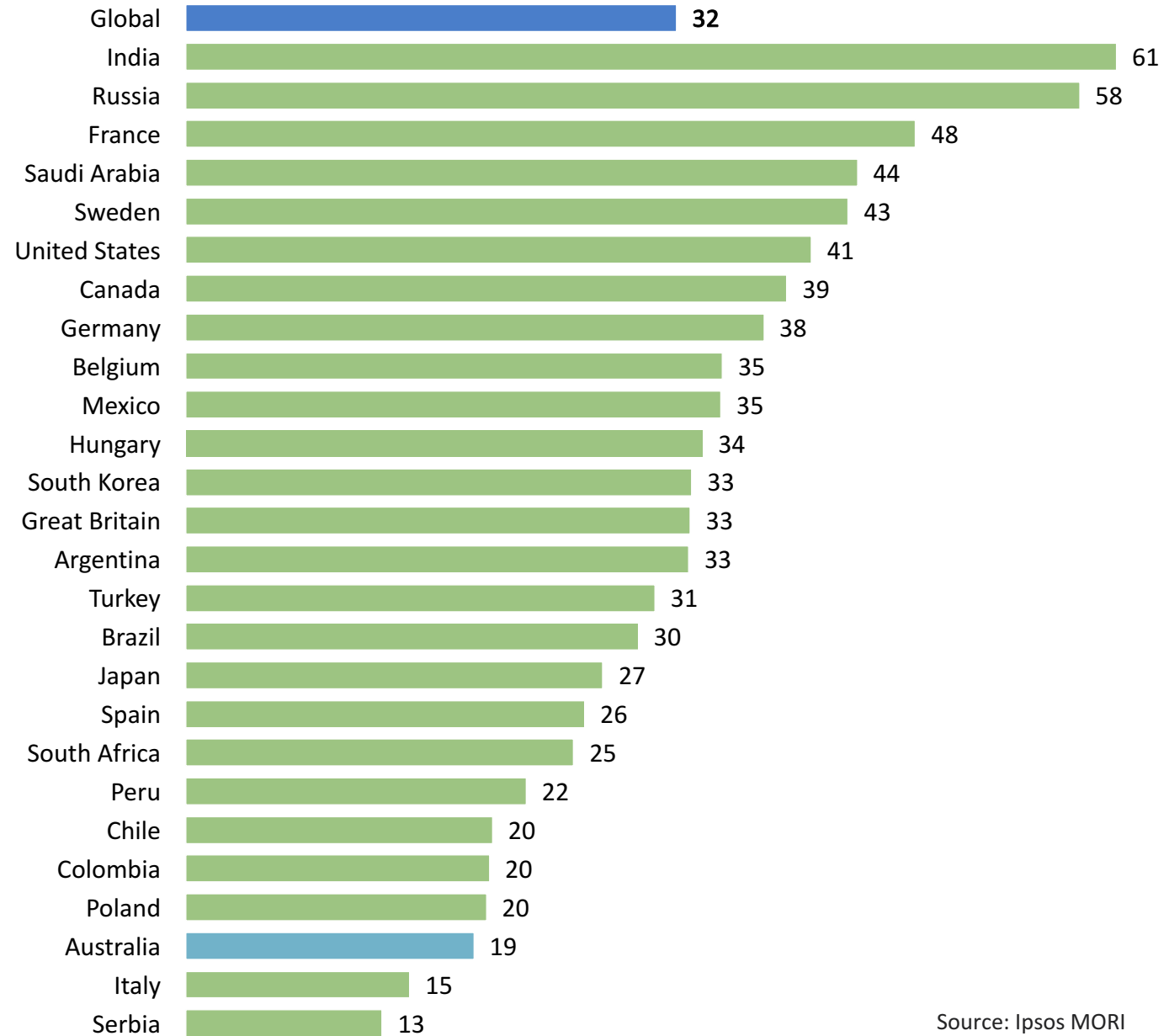
Nuclear

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Nuclear infrastructure to generate energy

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

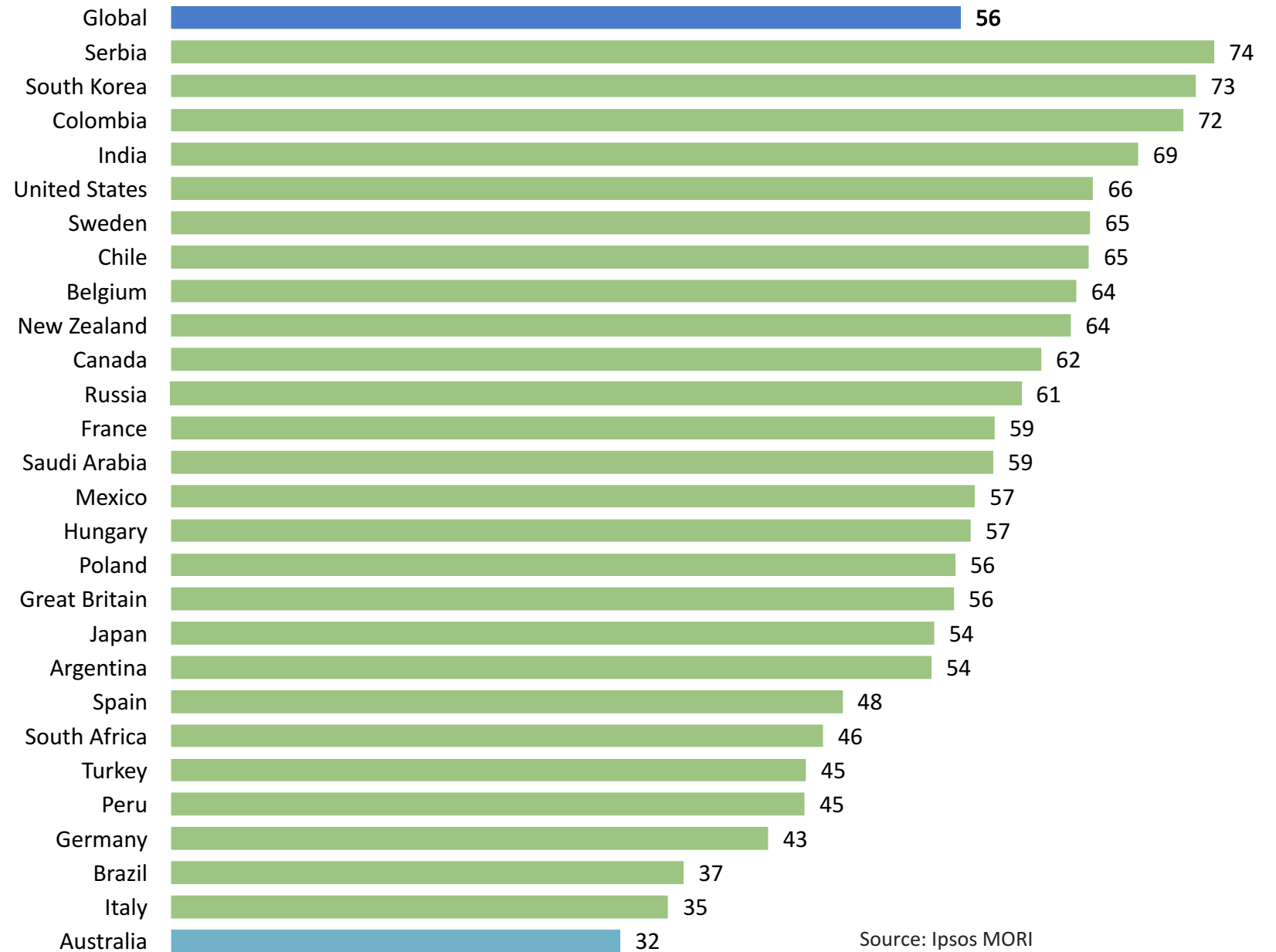
Broadband

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

High speed broadband

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

Water supply

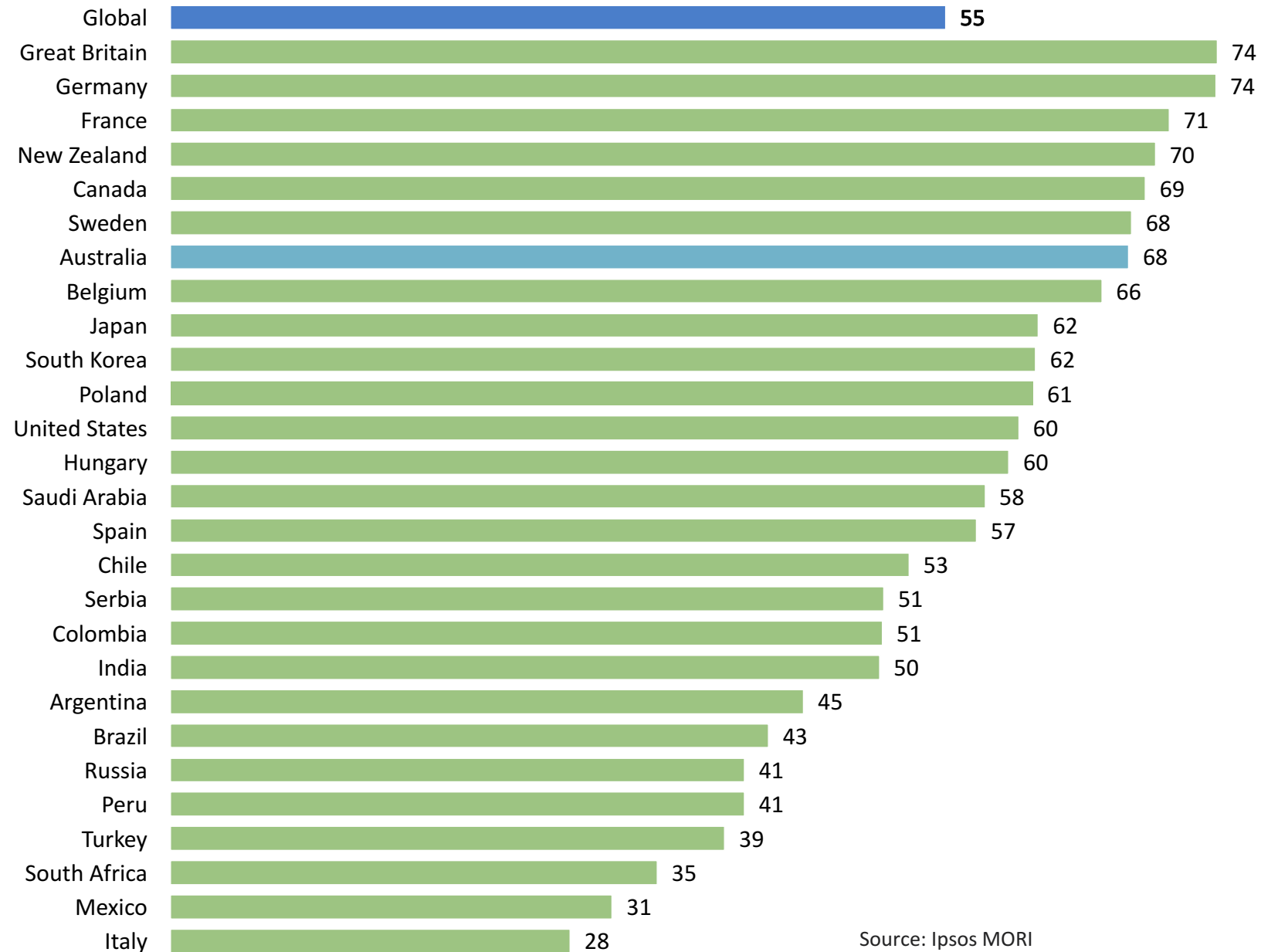
& sewerage

Q. These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Water supply and sewerage

% very/fairly good



Source: Ipsos MORI

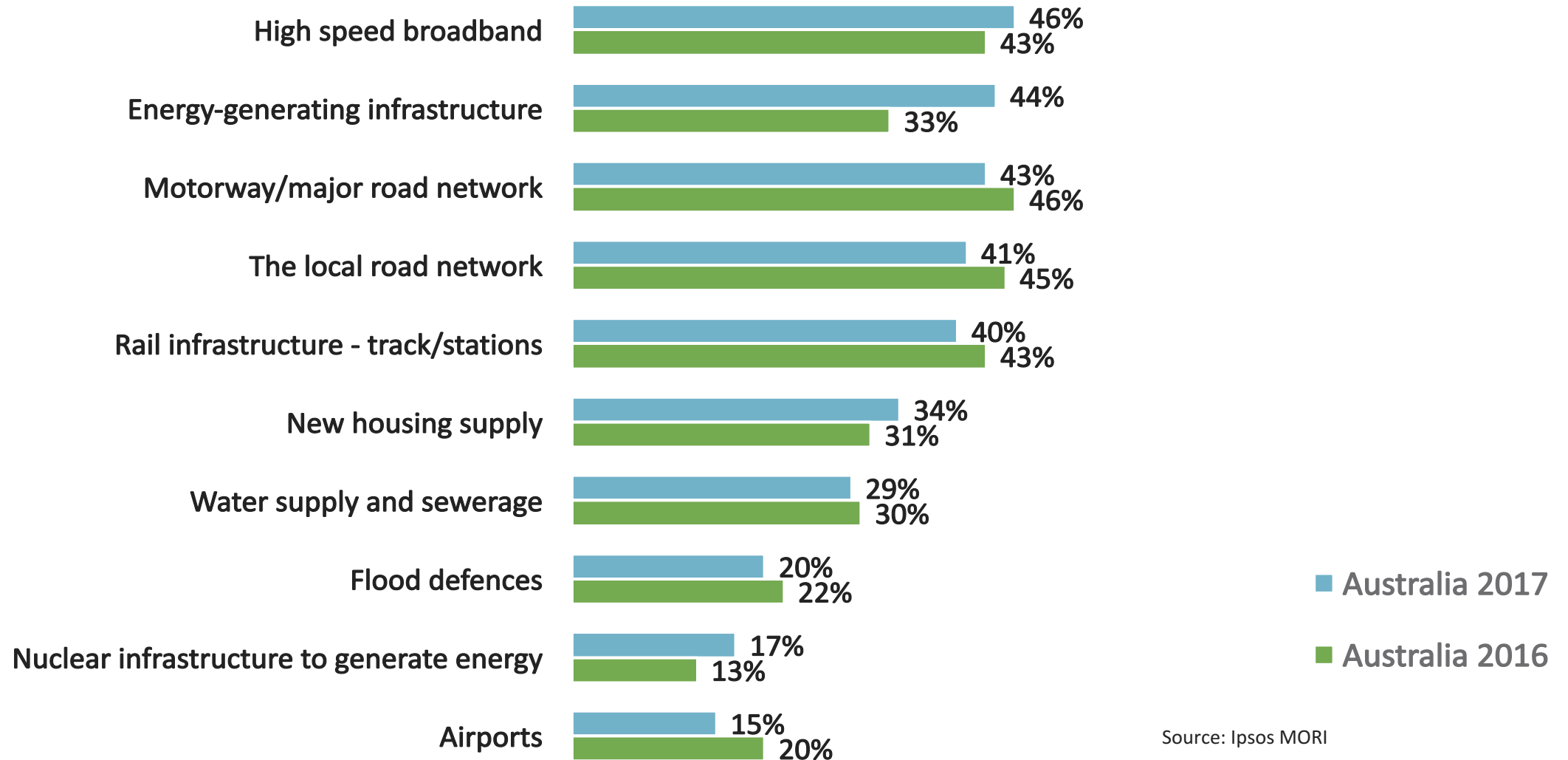
Base: 21,043 adults (online), Aug-Sept 2017

Priorities



High speed broadband, energy-generating infrastructure and rail are top priorities for Australians in 2017

Q. Which of these types of infrastructure, if any, do you think should be made a priority for investment for... Australia]?

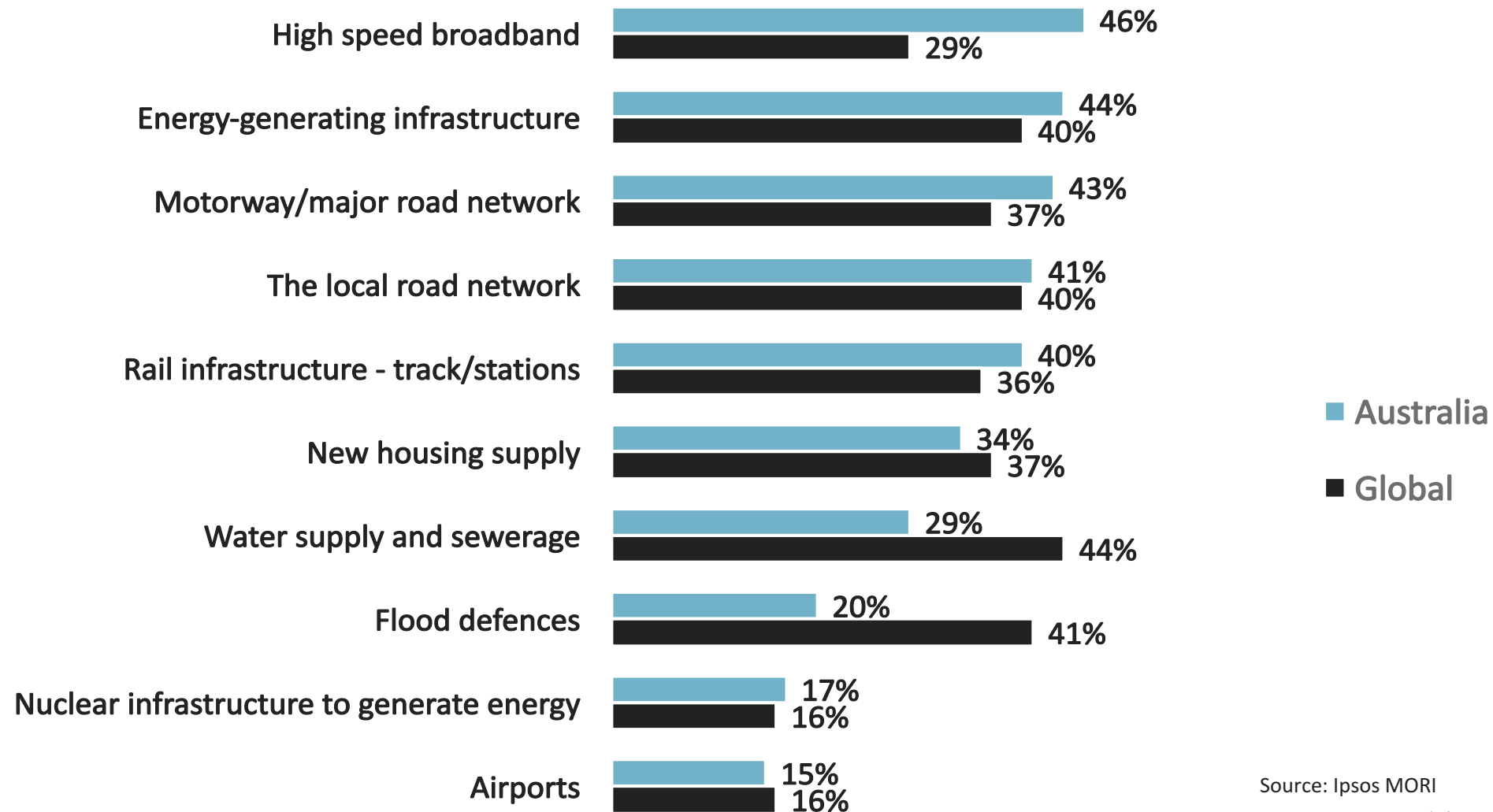


Source: Ipsos MORI

Base: 1,001 AUS adults among 21,043 adults (online), Aug-Sept 2017

Priorities

Q. Which of these types of infrastructure, if any, do you think should be made a priority for investment for...
Australia?

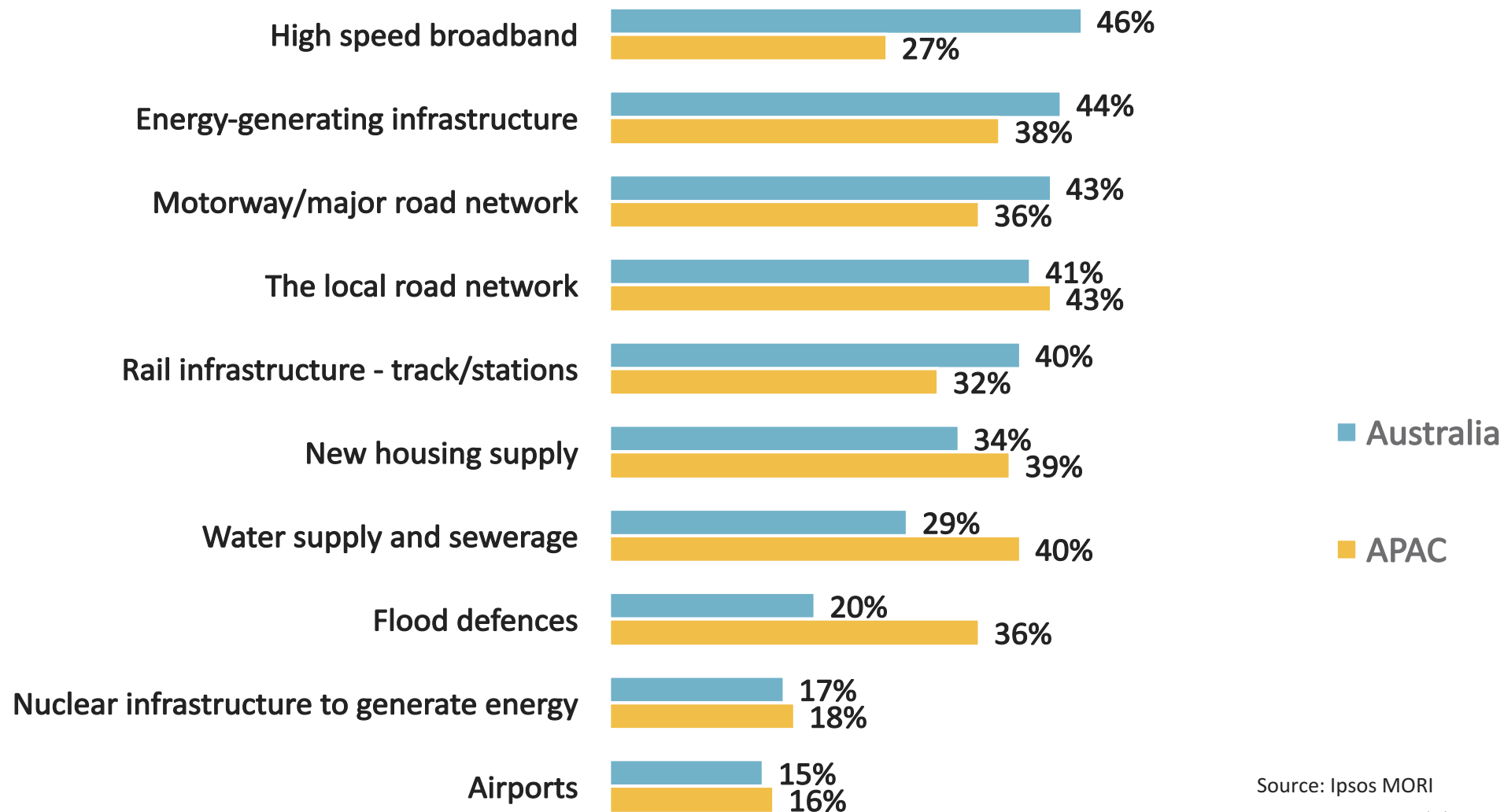


Source: Ipsos MORI

Base: 1,001 AUS adults among 21,043 adults
(online), Aug-Sept 2017

Priorities

Q. Which of these types of infrastructure, if any, do you think should be made a priority for investment for...
[COUNTRY]?



Source: Ipsos MORI

Base: 1,001 AUS adults among 21,043 adults
(online), Aug-Sept 2017

Future factors

Q. Which of the following factors do you think are the most important for... [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following, in order of most to least important.

Potential factors in shaping plans for infrastructure in the future	% ranking as most important		
	Global	Australia	APAC
Disruption: the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved	10	8	7
Legacy: the infrastructure that we pass on to future generations	12	11	10
Resilience: how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change)	13	15	13
Environment: the impact our infrastructure has on our environment	18	20	16
Investment: paying for the costs of improving and building new infrastructure now, to avoid having to pay more later	14	12	11
Quality: making sure that infrastructure is as good as it possibly can be (e.g. in terms of speed or convenience of services)	18	23	16

Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

Attitudes

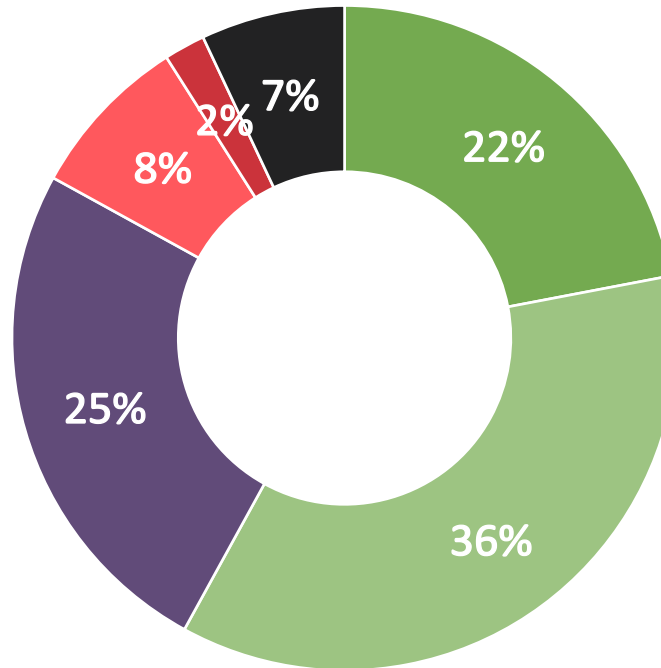


Australia: Continued sense that we are not doing enough

Q. To what extent do you agree or disagree...?

As a country we are not doing enough to meet our infrastructure needs

- % Strongly agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2017:

Agree	Disagree
58%	10%

2016:

Agree	Disagree
59%	7%

Source: Ipsos MORI

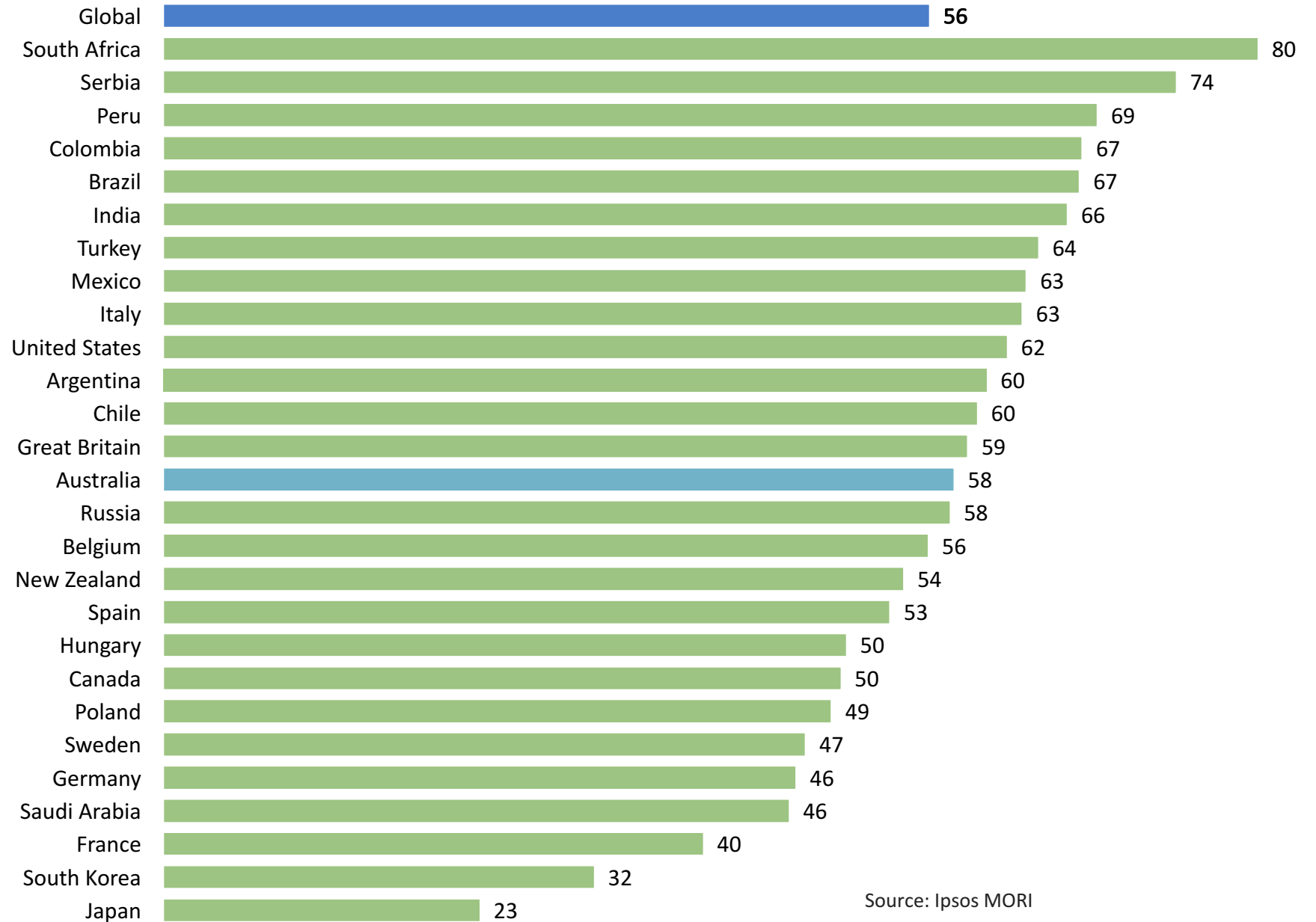
Base: 1,001 AUS adults among 21,043 adults (online), Aug-Sept 2017

Doing enough?

Q. To what extent do you agree or disagree...?

As a country we are not doing enough to meet our infrastructure needs

% strongly/tend to agree



Source: Ipsos MORI

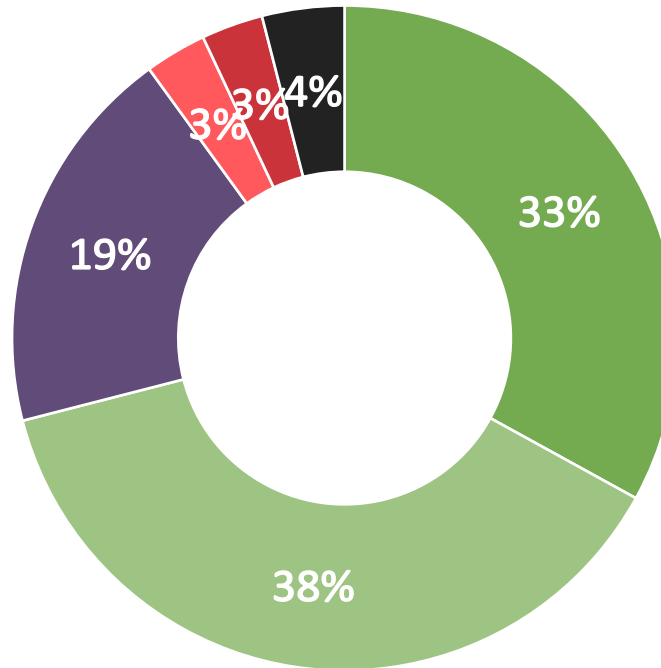
Base: 21,043 adults (online), Aug-Sept 2017

Australia: Investment in infrastructure is vital

Q. To what extent do you agree or disagree...?

Investing in infrastructure is vital to Australia's future economic growth

- % Strongly agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2017:

Agree	Disagree
71%	6%

2016:

Agree	Disagree
70%	4%

Source: Ipsos MORI

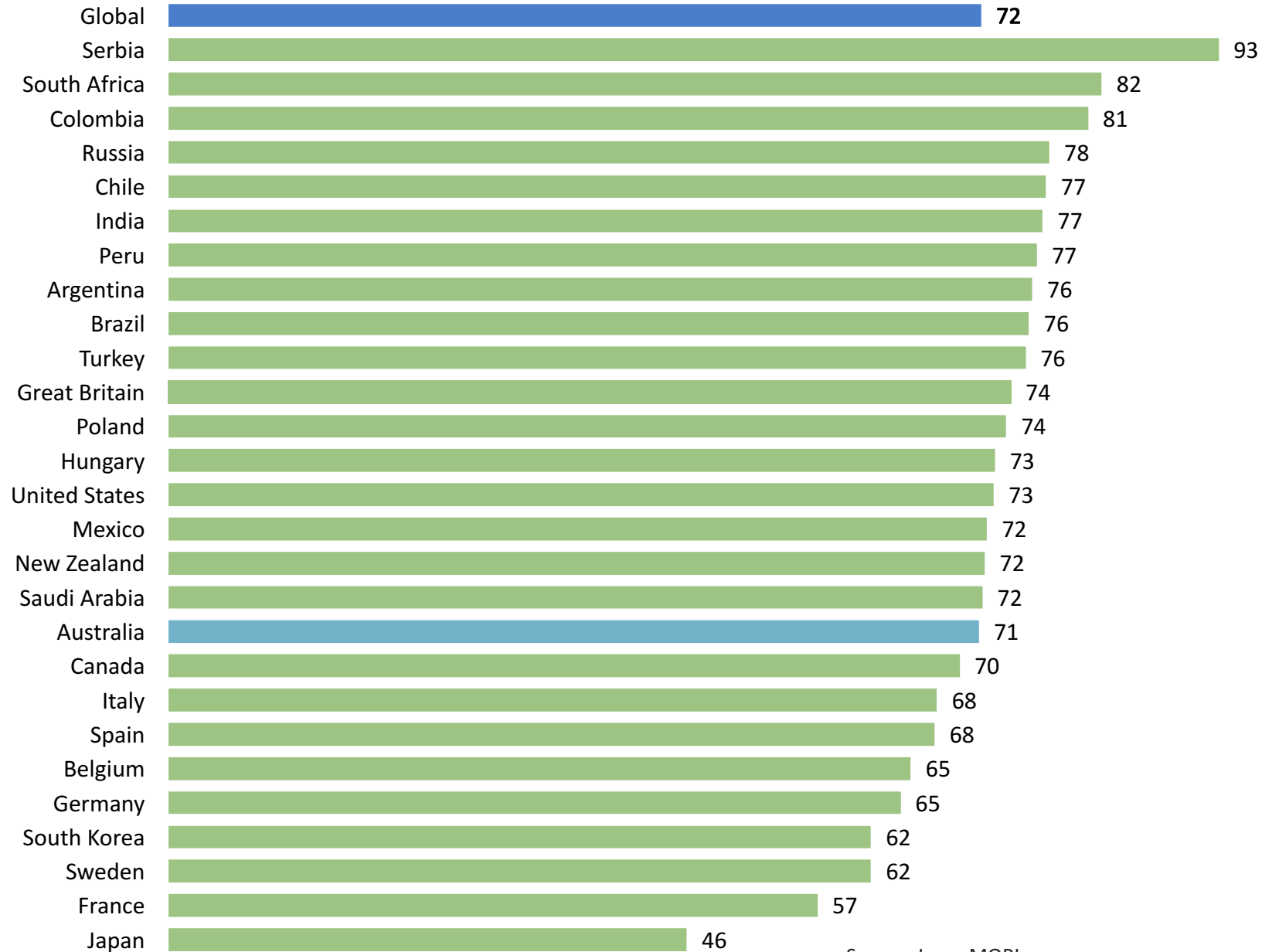
Base: 1,001 AUS adults among 21,043 adults (online), Aug-Sept 2017

Investment in infrastructure

Q. To what extent do you agree or disagree...?

Investing in infrastructure is vital to [COUNTRY]'s future economic growth

% strongly/tend to agree



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

Australia: more likely to believe local areas are not getting fair share

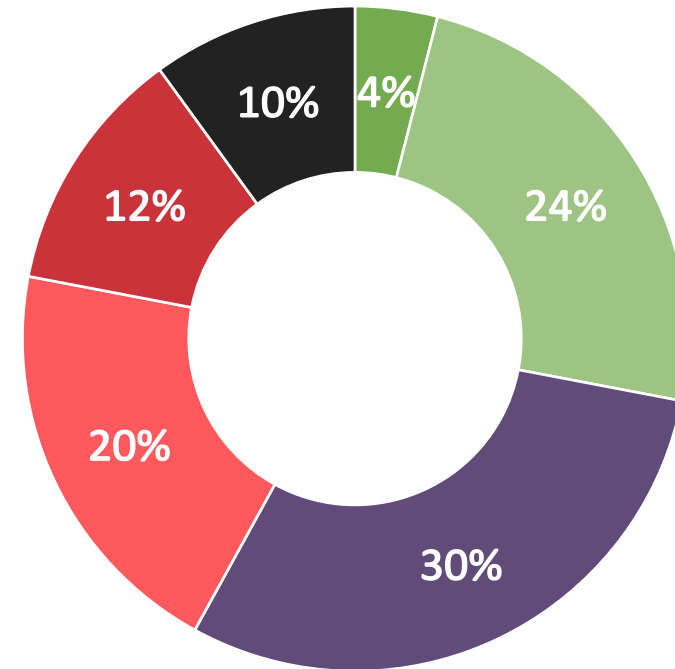
Q. To what extent do you agree or disagree...?

My local area gets its fair share of Australia's investment in infrastructure

Region:

	Agree	Disagree
VIC/TAS (258)	25%	31%
NSW/ACT (363)	32%	29%
QLD (196)	31%	35%
SA/NT (90)	15%	42%
WA (94)	24%	28%

- % Strongly agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2017:

Agree	Disagree
28%	35%

Source: Ipsos MORI

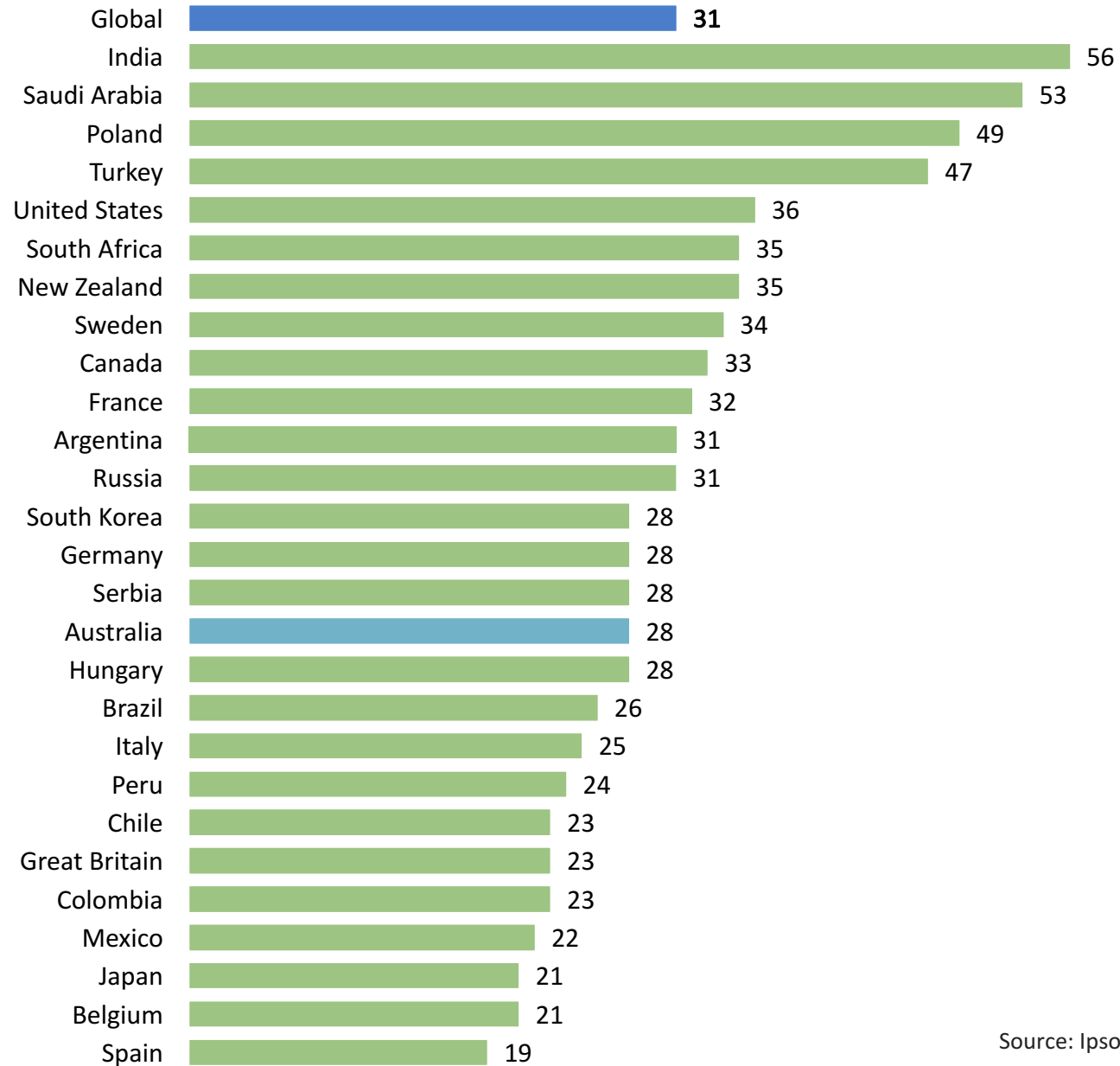
Base: 1,001 AUS adults among 21,043 adults (online), Aug-Sept 2017

Fair share

Q. To what extent do you agree or disagree...?

My local area gets its fair share of [COUNTRY]'s investment in infrastructure

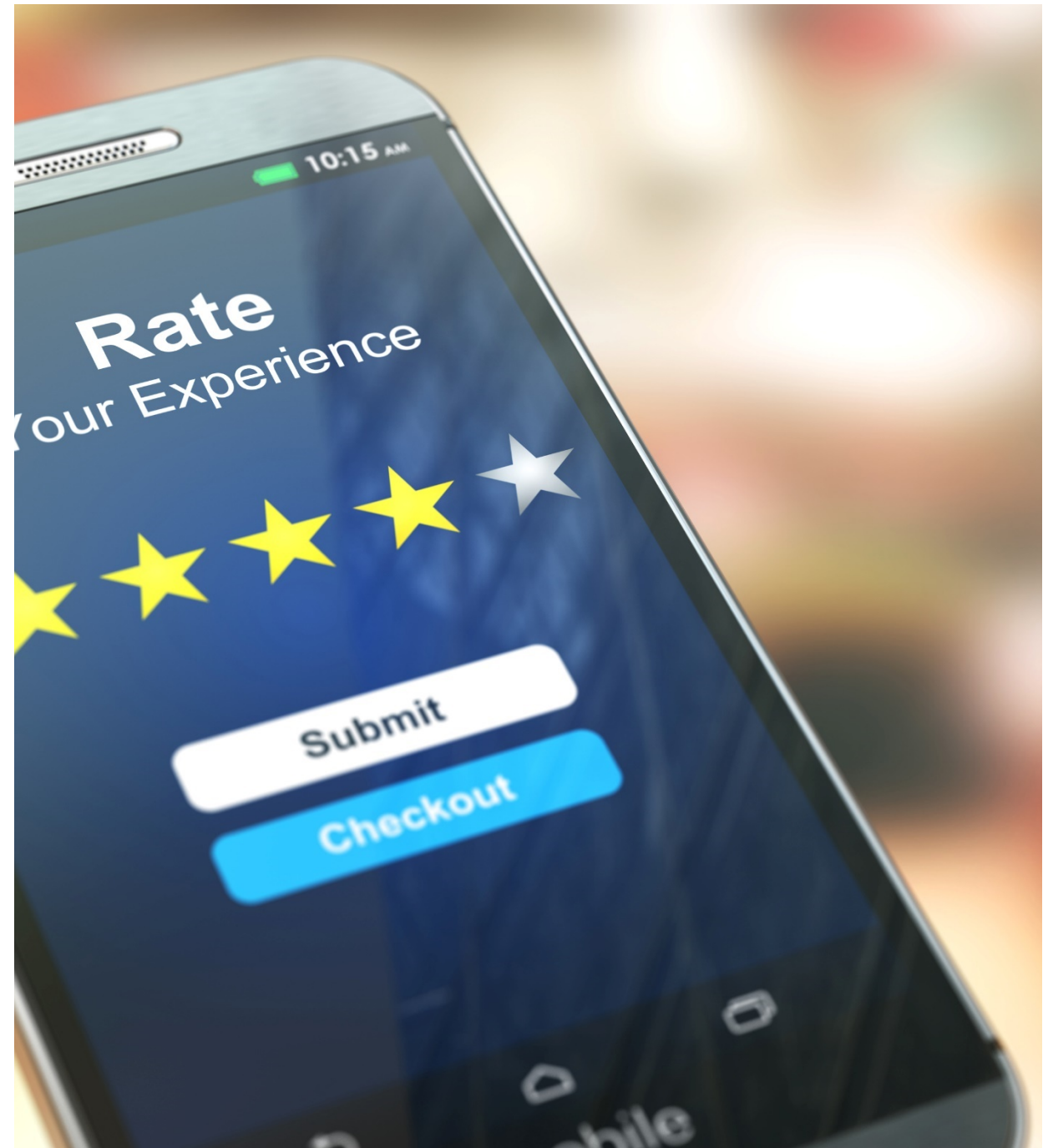
% strongly/tend to agree



Source: Ipsos MORI

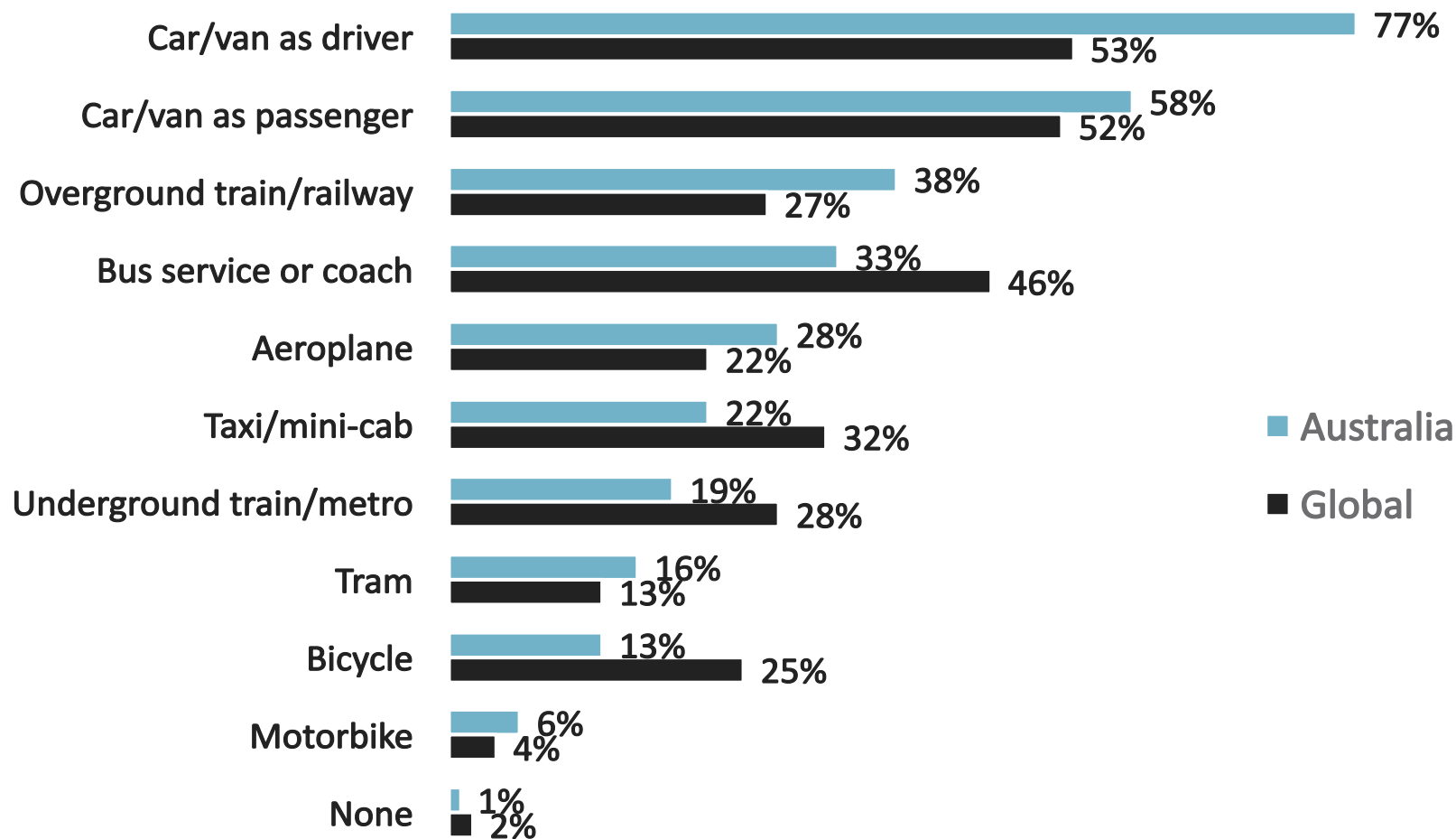
Base: 21,043 adults (online), Aug-Sept 2017

Experience



Usage

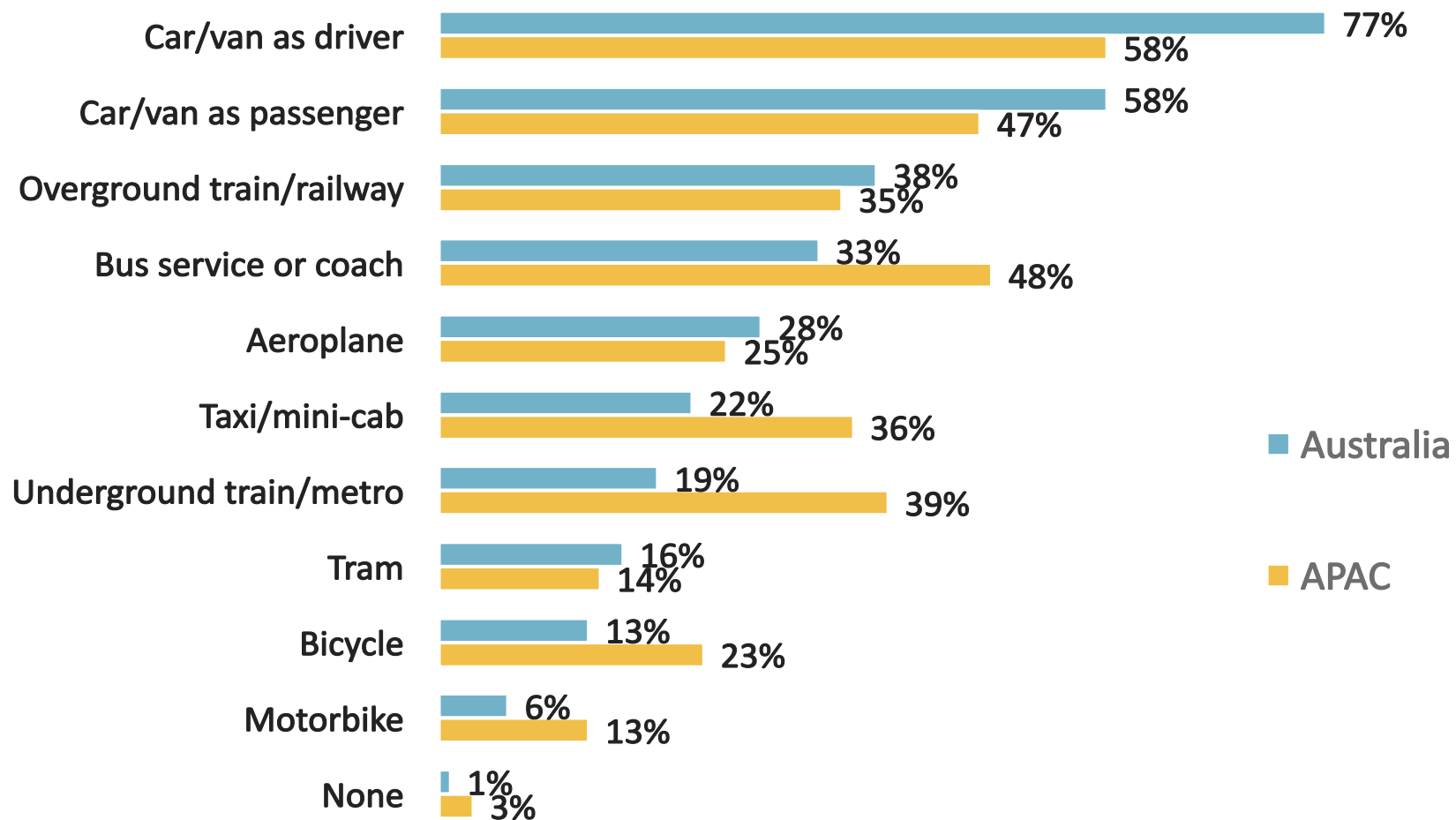
Q. Which of these types of transport have you used to make a journey in the past six months?



Source: Ipsos MORI
Base: 1,001 AUS adults among 21,043 adults (online), Aug-Sept 2017

Usage

Q. Which of these types of transport have you used to make a journey in the past six months?

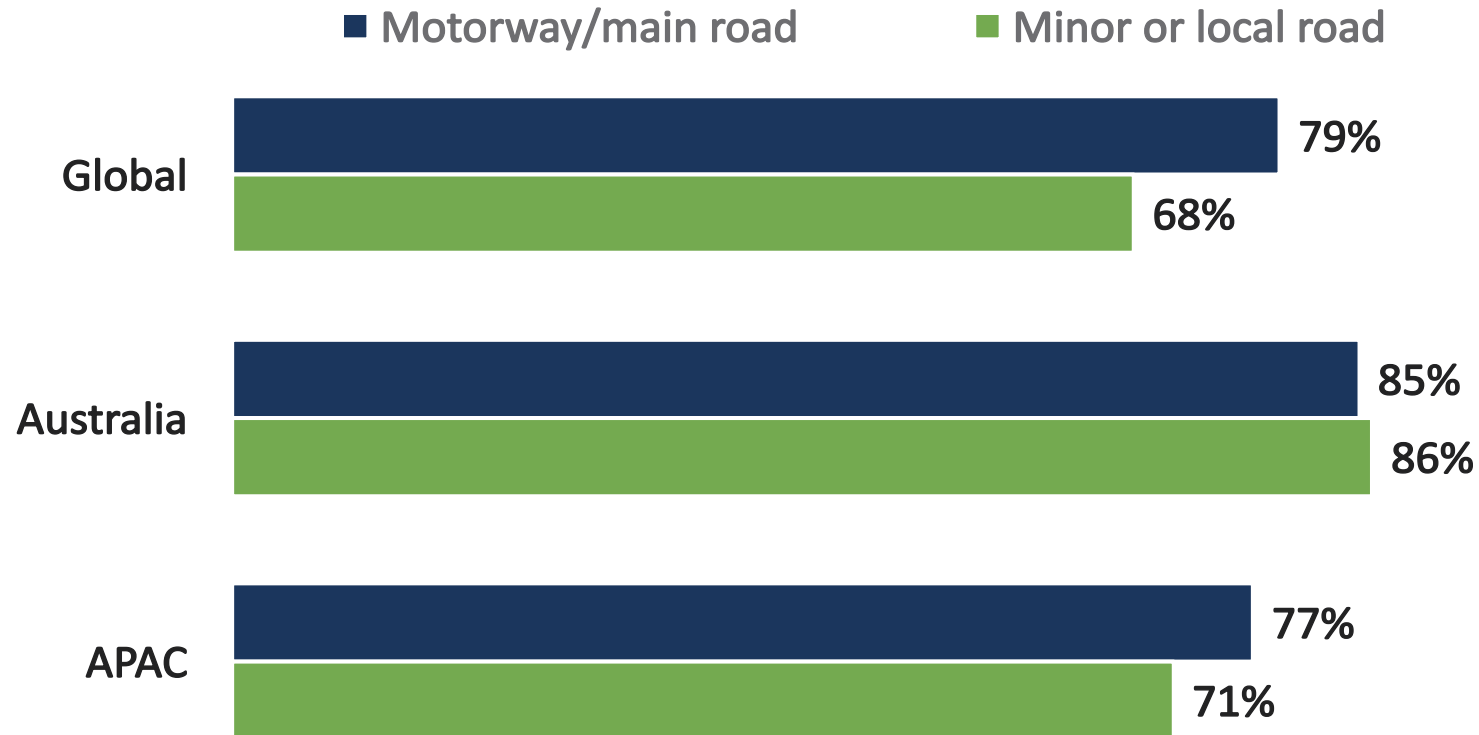


Source: Ipsos MORI

Base: 1,001 AUS adults among 21,043 adults (online), Aug-Sept 2017

Types of road used

Q. Thinking about the journeys you have made by road in the past six months, have they been on...



Source: Ipsos MORI

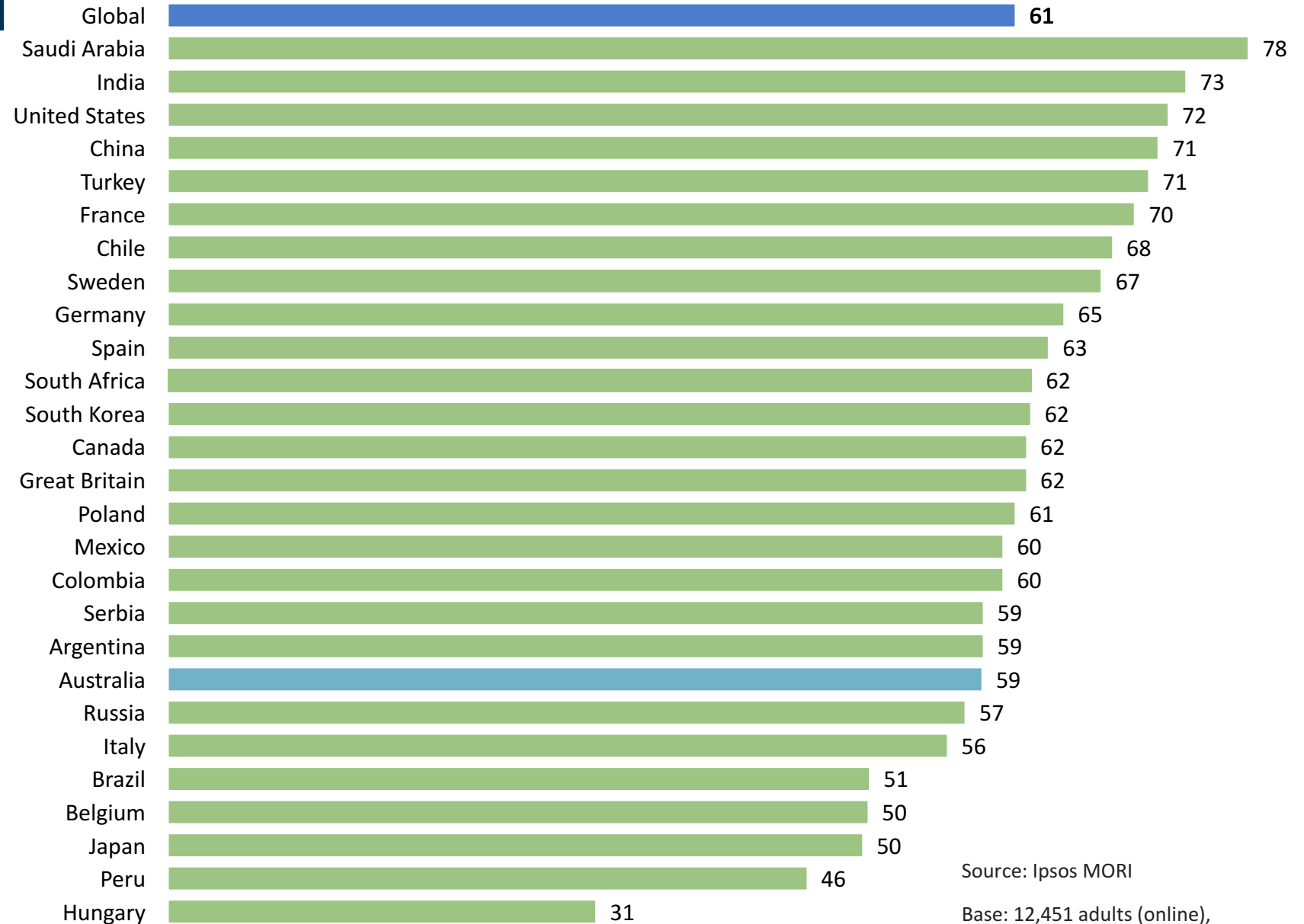
Base: All answering among 19,485 adults (online),
26 Aug-9 Sept

Satisfaction – car

Q. Thinking about the last time you made a journey by....
how satisfied or dissatisfied were you with your experience of that journey?

Car/van as driver

% very/fairly satisfied



Source: Ipsos MORI

Base: 12,451 adults (online),
26 Aug-9 Sept

Satisfaction – car

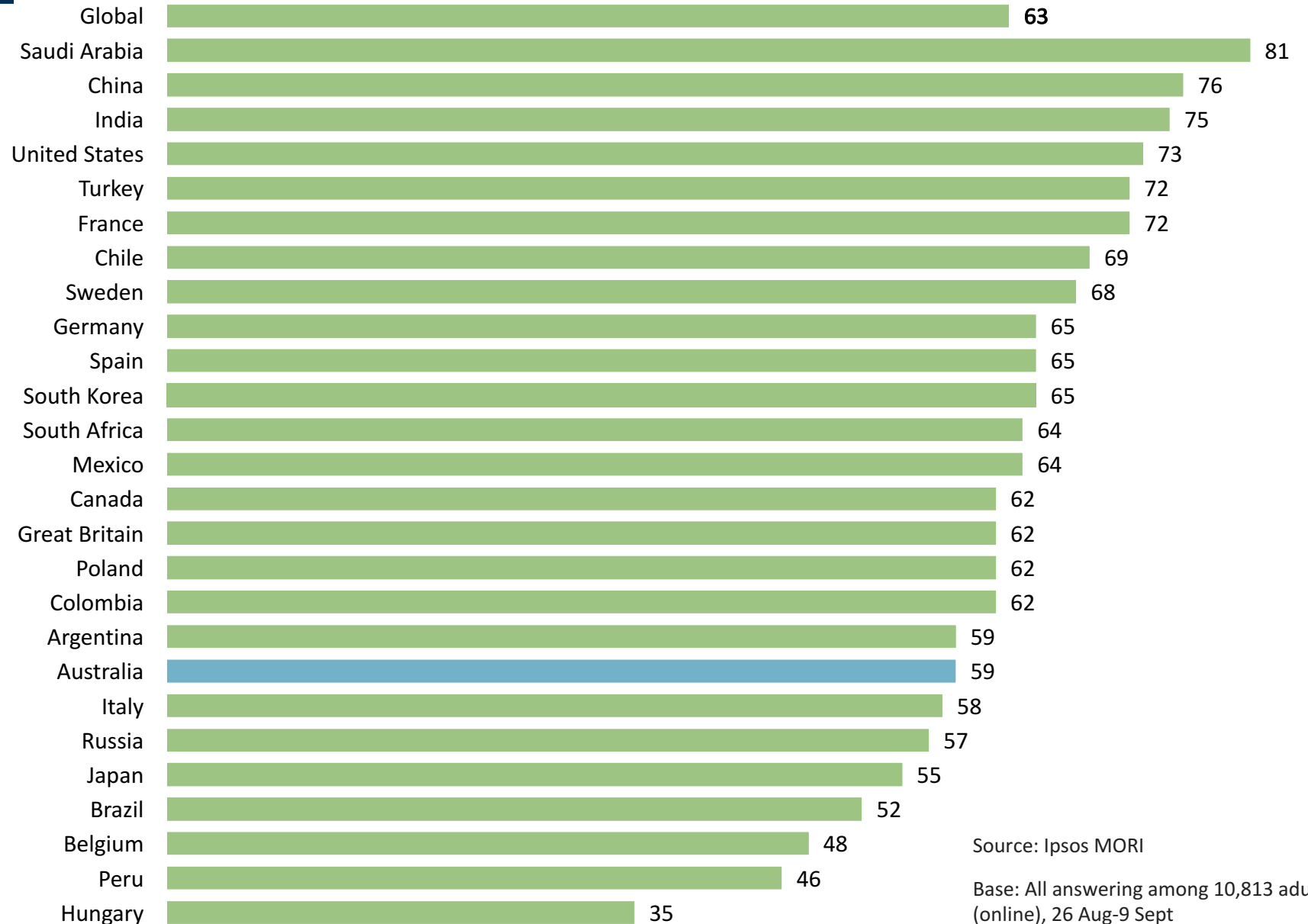
Among motorway users*

Q. Thinking about the last time you made a journey by ..., how satisfied or dissatisfied were you with your experience of that journey?

Car/van as driver*

% very/fairly satisfied

* N.B. Respondents were not asked specifically about their last driving journey on a motorway



Source: Ipsos MORI

Base: All answering among 10,813 adults (online), 26 Aug-9 Sept

Satisfaction – car

Q. Thinking about the last time you made a journey by ..., how satisfied or dissatisfied were you with your experience of that journey?

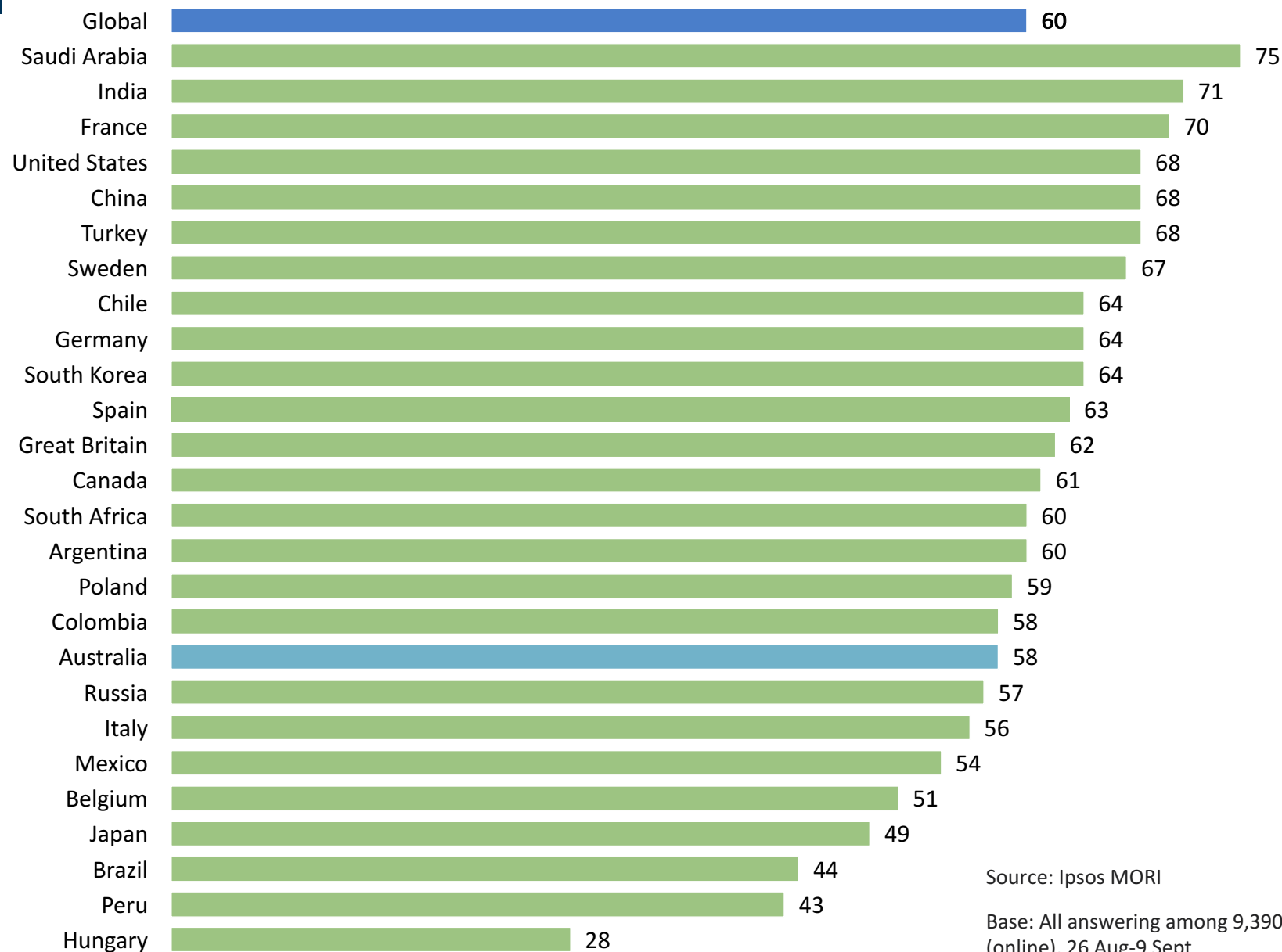
Car/van as driver*

% very/fairly satisfied

* N.B. Respondents were not asked specifically about their last driving journey on a local/other road



Among drivers on other roads*



Source: Ipsos MORI

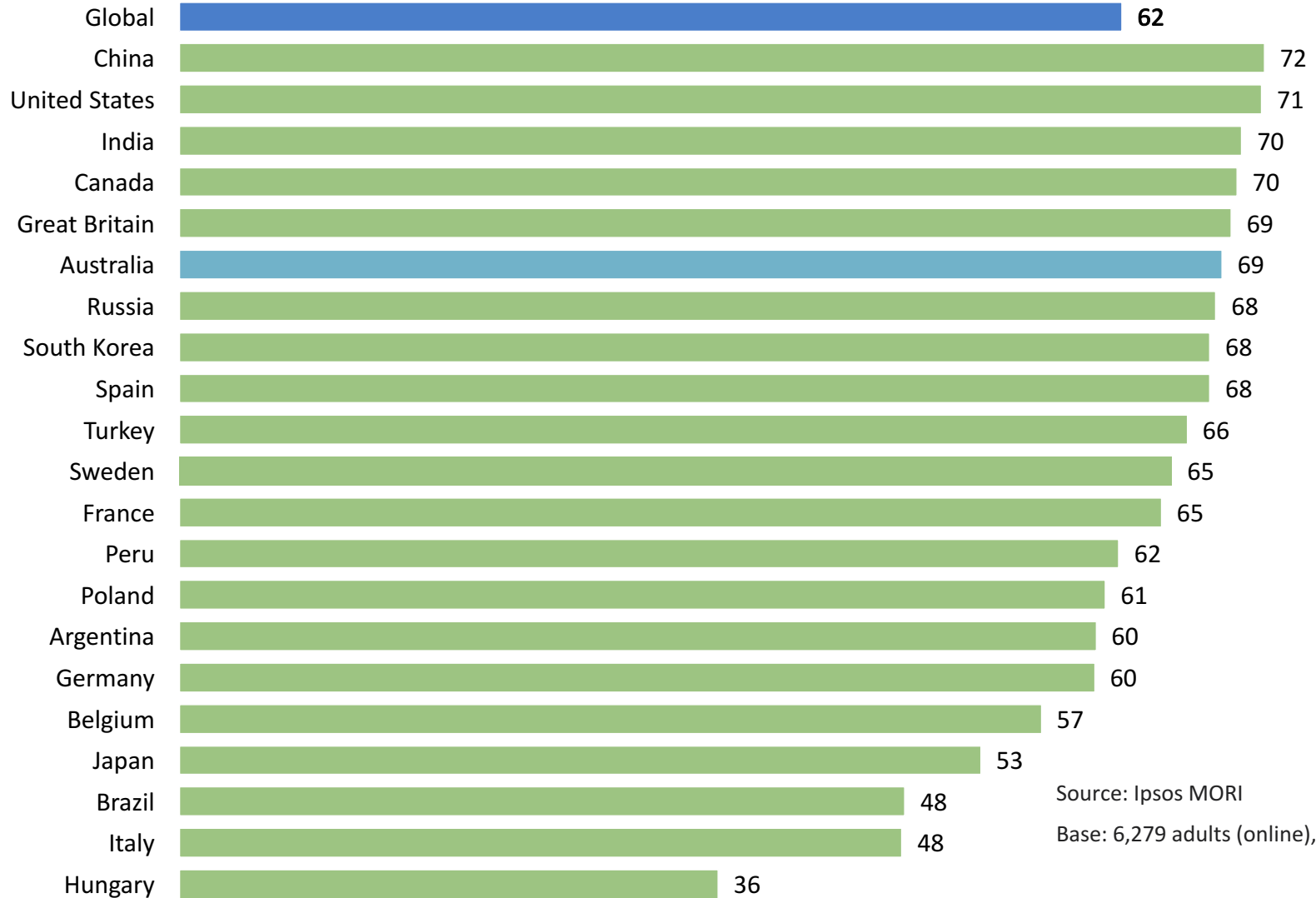
Base: All answering among 9,390 adults (online), 26 Aug-9 Sept

Satisfaction – overground rail

Q. Thinking about the last time you made a journey by....
how satisfied or dissatisfied were you with your experience of that journey?

Overground train/railway

% very/fairly satisfied



Source: Ipsos MORI

Base: 6,279 adults (online), 26 Aug-9 Sept

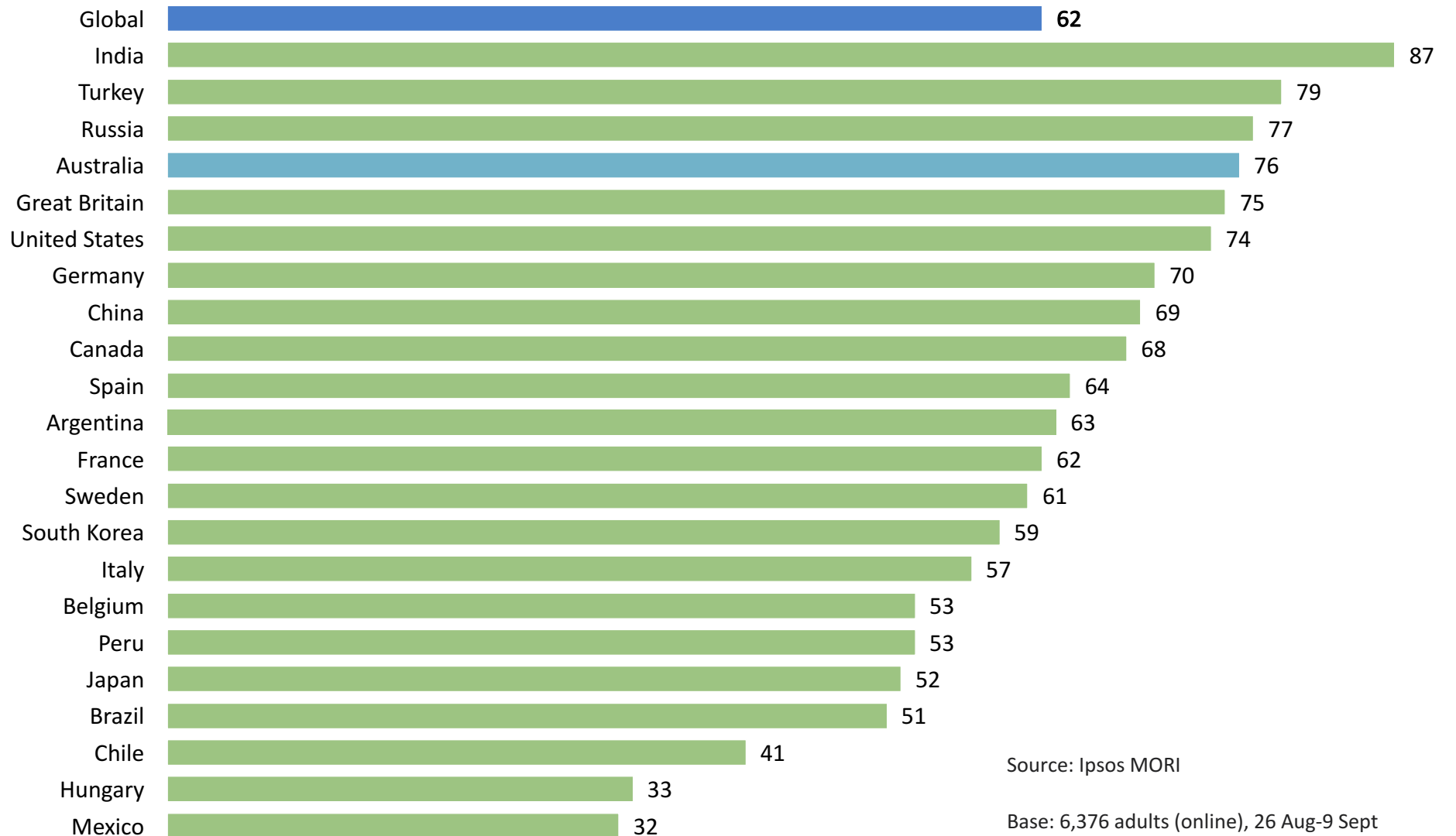
Confined to countries >n=100

Satisfaction – underground rail

Q. Thinking about the last time you made a journey by....
how satisfied or dissatisfied were you with your experience of that journey?

Underground train/metro

% very/fairly satisfied



Source: Ipsos MORI

Base: 6,376 adults (online), 26 Aug-9 Sept

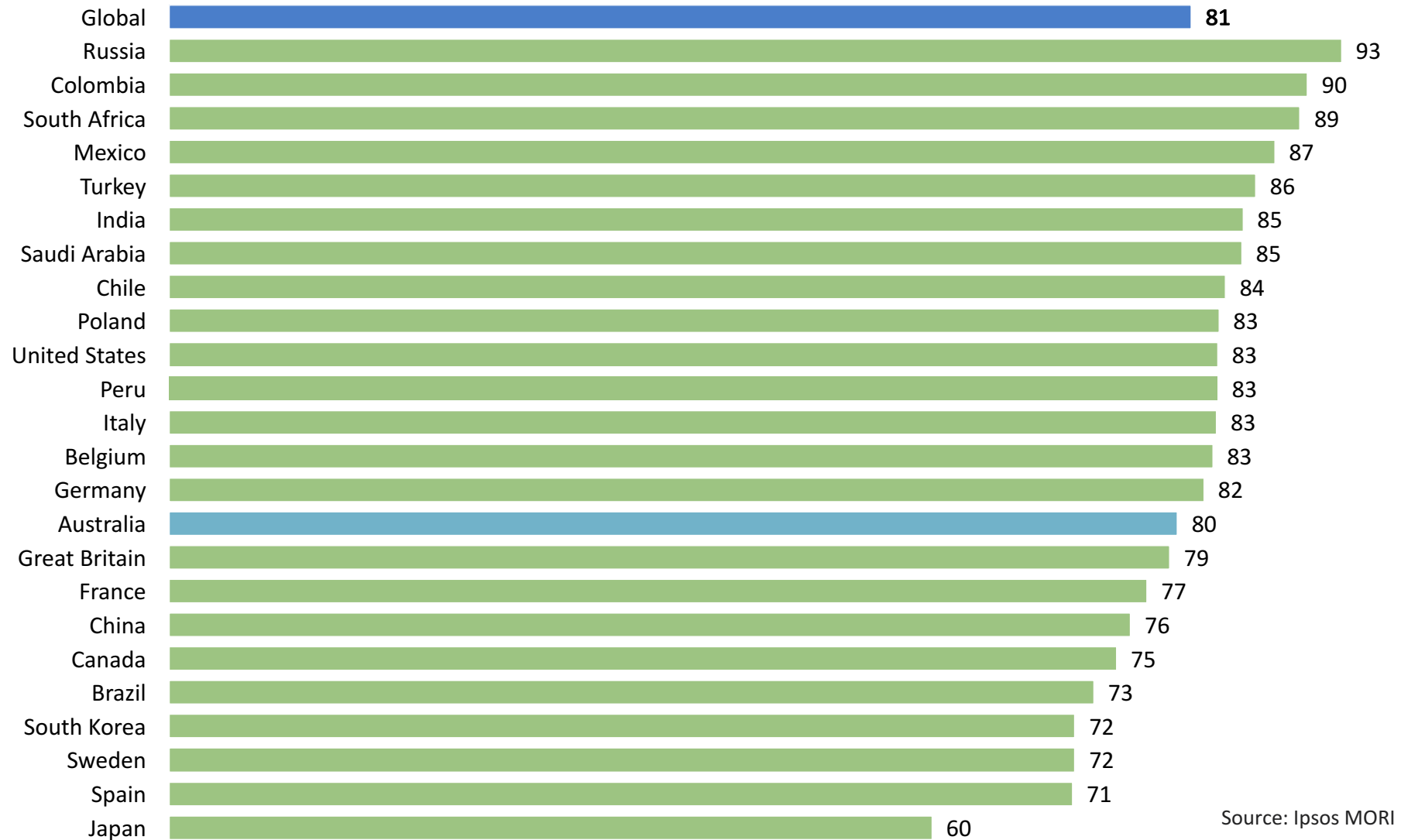
Confined to countries >n=100

Satisfaction – air travel

Q. Thinking about the last time you made a journey by....
how satisfied or dissatisfied were you with your experience of that journey?

By aeroplane

% very/fairly satisfied



Source: Ipsos MORI

Base: 5,263 adults (online), 26 Aug-9 Sept

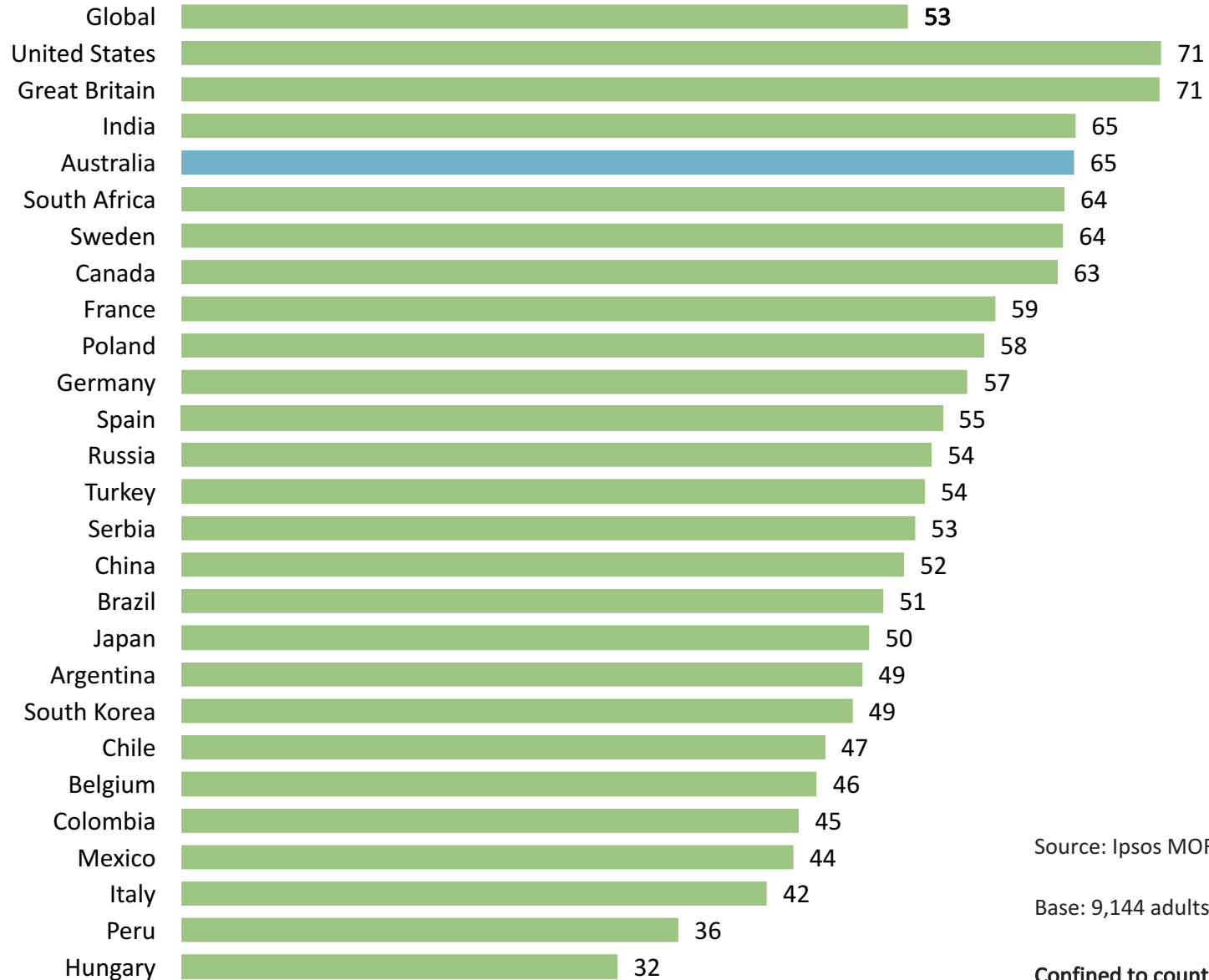
Confined to countries >n=100

Satisfaction – bus/coach

Q. Thinking about the last time you made a journey by....
how satisfied or dissatisfied were you with your experience of that journey?

Bus services/coach

% very/fairly satisfied



Source: Ipsos MORI

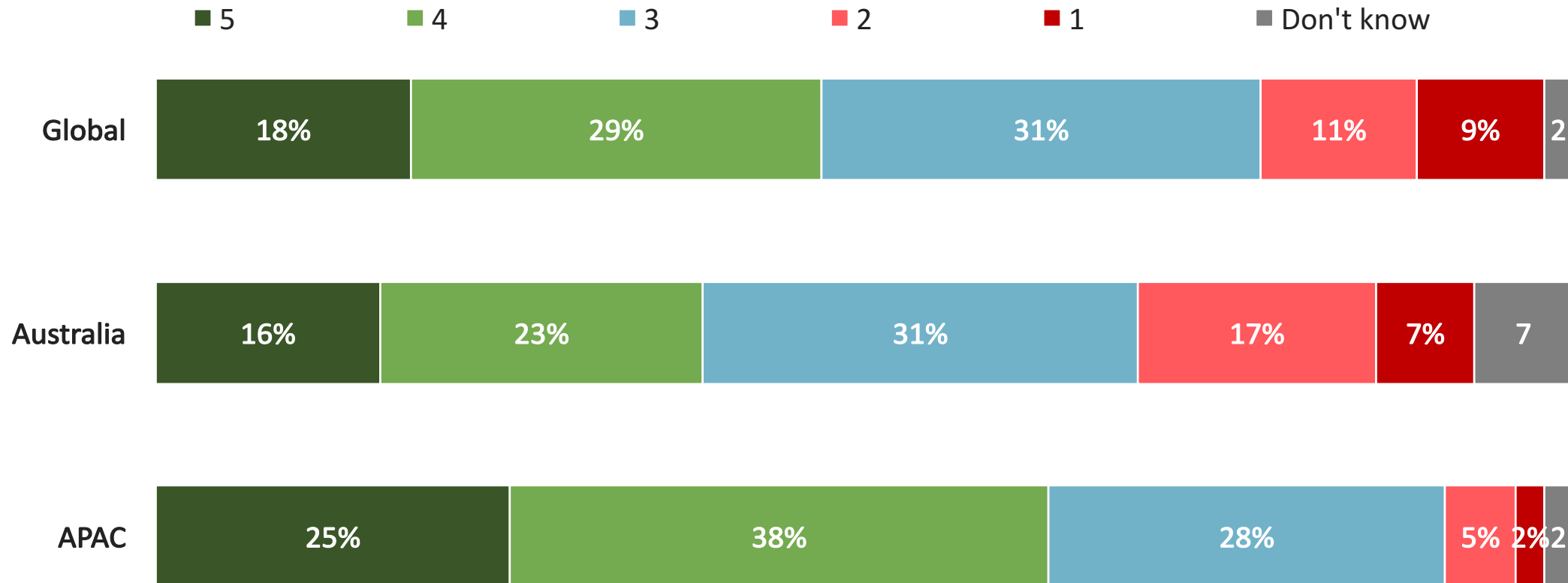
Base: 9,144 adults (online), 26 Aug-9 Sept

Confined to countries >n=100

Value for money – underground rail

Q. Thinking about the last time you made a journey by...., how would you rate the value for money of that journey on a scale of 1-5 where 1 is very poor value for money, and 5 is very good value for money?

Underground/metro



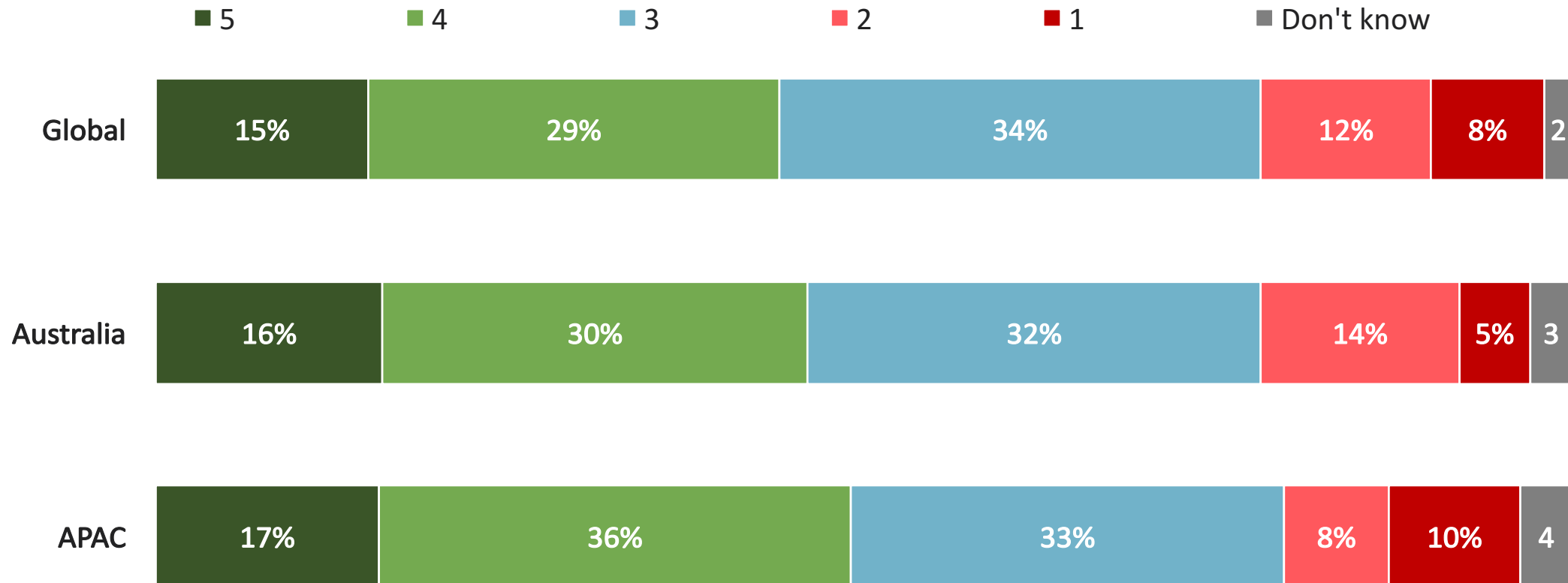
Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

Value for money – overground rail

Q. Thinking about the last time you made a journey by..., how would you rate the value for money of that journey on a scale of 1-5 where 1 is very poor value for money, and 5 is very good value for money?

Overground/railway



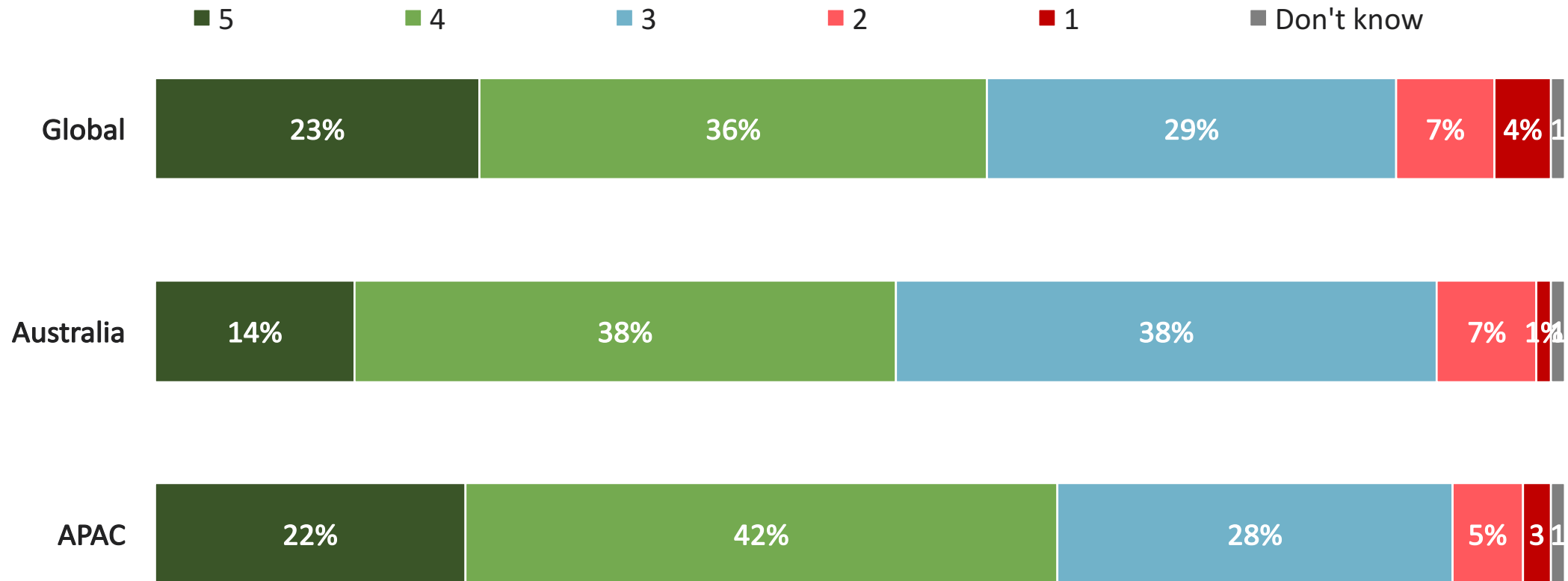
Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

Value for money – air travel

Q. Thinking about the last time you made a journey by..., how would you rate the value for money of that journey on a scale of 1-5 where 1 is very poor value for money, and 5 is very good value for money?

By aeroplane



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

Further

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Global Infrastructure Index

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October 2017

